

Dear [Client Name],

I wanted to take a moment to check in and make sure your Life Insurance Policy is up-to-date with your life. The last time we reviewed your policy was [# years] ago and I know that a lot can happen in that time!

Every [# years] or so, I find that some of my clients' needs have changed and I like to perform a complimentary Policy Review to align their coverage with their evolving circumstances.

There are a number of life events that warrant giving an old policy a fresh look. A recent or upcoming retirement, changes to your health, assets, and other major events may mean that you have more or less responsibilities to protect that are not reflected in your current policy.

If you would like me to review your current policy with you feel free to give me a call or send me an email back. The process doesn't take long and could result in a policy that is a better fit for your future.

Sincerely,