

Print on Agent/Agency letterhead

[dd,mm,yy]

[Name]

[Address]

[Address]

Dear [Client],

I am taking this opportunity to contact you in regard to the performance of your life insurance policy/policies. The life insurance industry has been rapidly changing. There have been improvements in product design and changes in policy performance and underwriting guidelines. In addition, each life insurance company's performance, ratings and policies affect the way an insurance policy performs.

Our Life Insurance Assessmentsm program is designed to ensure that every client has the best possible life insurance solution available in the market today. The result of the assessment will be an OBJECTIVE evaluation of your current policy (ies), including comparisons to today's marketplace and pricing. Hopefully we will find that your coverage is performing as it was originally designed and intended.

I will be calling you in the next few days to schedule a time for us to begin this process. Thank you for your continued business.

Sincerely,

[Agent Name]