

Print on Agent/Agency letterhead

[dd,mm,yy]

[Company]
[Name]
[Address]
[Address]

Dear [Strategic Partner],

As you are aware, the fiduciary responsibility we hold for our client's financial future is the foundation of our business. The financial market's recent volatility has created understandable concern for our clients and has exposed potential weaknesses in their portfolios.

The life insurance industry has also 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.

As a valued partner, we want to ensure that we are assisting you in providing the best available solutions to your client's specific planning needs and goals. To accomplish that, we are rolling out a new program called the Life Insurance Assessmentsm. This 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 client's current policy(ies), including comparisons to today's marketplace and pricing. This service is provided at no cost to you, one of our valued partners.

The program provides a consultative review and results in a professional presentation of the analysis that can be delivered by you to your customer. You will find this presentation a great service to your client and will either re-affirm the good decision made to purchase their current policy(ies), or will allow your customer financial savings or possibly expanded coverage.

I will be calling you in the next few days to schedule a time for us to review this process and some sample audits so you can see the power of this service. Thank you for your continued business.

Sincerely,

[Agent Name]