

[YOUR NAME]

[YOUR TITLE (ex. Life Protection Specialist)]

[YOUR EMAIL]

[YOUR PHONE #]

[DATE]

[CLIENT NAME]

[CLIENT ADDRESS LINE 1]

[CLIENT ADDRESS LINE 2]

Dear [CLIENT NAME],

Thank you for allowing me to meet with you! It was a pleasure to assist you in putting the right policy plan in place to protect your home and family.

I provide annual policy reviews as a free service to you and your family. At our reviews, I will be able to ensure that changes in your family life are kept up to date with your financial needs. I look forward to helping you now and in the future.

If you know anyone who can benefit from my services, I would love to help them as well.

Sincerely,

[YOUR NAME]

[YOUR PHONE NUMBER]

*Please note that I can also help you with:

Retirement Solutions, Child College Funding, and Final Expenses