

Financial Professionals Should Place the Text of This Document on Their Own Company Letterhead

Date

Client Name

Address

City State Zip

Dear Client Name,

You and your family may have experienced a lot of change since you first purchased your life insurance policy. Births, new jobs or careers, retirement, even changes in marital status. These types of life changes will probably continue.

That's why it is truly important to review your life insurance protection every year. Significant changes in your life usually mean there may be changes to your insurance protection needs, too. Most of us know this, but too often we postpone reviewing our coverage to see if we have the right protection.

But everyone should know if their insurance coverage still meets their current needs and makes sense for their long-term financial plans. Not knowing could cost you and your family much of what you've worked for: comfort, security, and peace of mind.

We would like to help monitor your financial situation and help you make the best decisions possible about your life insurance portfolio. This is a complimentary client service; my purpose is not to sell you more insurance, but to maintain an ongoing dialogue with you and be there if or when your needs change.

A life insurance review is a very important part of your overall financial plan for you and your family. I urge you to take advantage of this opportunity regularly.

To help, I would be glad to schedule a time to sit down with you. I invite you to call me at (insert phone number) at your earliest convenience to schedule an appointment. I look forward to helping you plan for a secure future.

Sincerely,

Financial Professional Name

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