

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

Date

Client Name

Address

City State Zip

Dear Client Name,

At least once a year, either you or your broker reviews your auto insurance, your homeowner's insurance, and either you or your employer reviews your medical insurance.

Why are these insurance types reviewed frequently? There are a number of reasons:

1. To assure your coverage is up to date with your needs.
2. To assure your insurance contains the latest improvements in coverage.
3. To assure you are getting the best pricing available.

The one insurance that often gets overlooked is life insurance even though the same circumstances exist for life insurance as for other types of insurance. Additionally, regulatory authorities are beginning to require that brokers review life insurance programs on a regular basis.

A program is now available to us for use with our clients to review and update their life insurance. This program will make sure your coverage is up to date with your current needs, make sure you have the latest coverage improvements, and make sure you have the best pricing available.

To proceed with this, we simply need a few questions answered together with your authorization to permit us to get information from your life insurance carrier. To that end, I will call you in the next day or two to follow up.

Sincerely,

Financial Professional Name

**FINANCIAL PROFESSIONALS: REMOVE INFORMATION BELOW BEFORE SENDING TO YOUR CLIENTS**

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