

Does your life insurance still meet your needs?

<firstName>,

I can't believe it has been <<almost a year>> since you completed your life insurance policy! Thank you again for choosing to work with me to purchase your life insurance. If you have any questions about your current policy, please be sure to let me know.

I like to reach out to my Platinum Policy Customers regularly to see if they have had any changes that might require updates to their coverage. Things like a new home purchase, new dependents or even a promotion at work can mean you need to re-evaluate your coverage options. There may also be circumstances which allow me to help lower your current Life Insurance Premium based on <<Sample Health Change>>.

Let's spend a few minutes together to take a look at your existing life insurance policy, compare it to other available policies, and ensure we are still meeting your exact needs. Feel free to call me today at <<phone>> to review your options.

Regards,

<agentfirstName> <agentlastName>
<title>
<<phone>>
ABC Insurance Services

<First name>,
I look forward to
speaking with you,
<Agent name>

P.S. Here are a few things to consider while we assess your life insurance needs:

- | | | |
|---|--|---|
| ☐ Has your marital status changed? | ☐ Do you have a new child? | ☐ Has your career changed? |
| ☐ Has your income changed? | ☐ Any changes to your health? | ☐ Have you purchased a new home? |
| ☐ Any changes in your medications? | ☐ Have you lost weight? | ☐ Have you Stopped smoking? |

