

POLICY MANAGEMENT:

Sample Letter and Email Verbiage

PROSPECT LETTER/EMAIL

Dear [name],

Isn't it amazing how quickly things change? Our family grows larger or smaller over the years, and the size of our home usually changes with it. It seems we're always renovating, moving, upsizing, or downscaling to meet our needs. We buy new things, replace the old with the new, or sometimes add those well-deserved little luxuries along the way.

It can be easy to forget one of the most important things to consider as our lives, family and future income. Your life insurance coverage should change and grow with you whenever these life events happen. In the last few years, there have been many innovations in life insurance that might help you save some money, or get you more coverage. And, there are several factors when managing your policy to evaluate a carrier's strength and the cost of insurance. Sometimes we're able to leverage the cash value of your insurance policy, and get you additional benefits like long-term care expenses or increase your death benefit.

Let us help you analyze your coverage with a complimentary policy review. We promise to make it as easy and convenient as possible. Call us today for an appointment at (phone). It could be one of the best moves you'll make this year!

[your name]

[your title]

[your company]