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[Date]

Dear [prospect name]

First of all, I want to thank you for allowing me to take part in helping to shape your financial future. The opportunity to work with people like you and [spouse name] is one of the most enjoyable aspects of my job.

Second, I'd like for you to take a moment to consider how your life has changed over the last several years. Was there a change in your marital or family situation? Did you start your own business or earn a promotion? Did your children begin — or complete — their college educations?

My point, [prospect name], is that as your life changes, so do your insurance needs. Maybe you need more, or perhaps you need less. Or it's possible that the products you selected are no longer the best option for helping you achieve your goals. That's why I invite all my clients to complete a brief, easy policy review every few years.

I will be calling you within the next few days to arrange a time when we can sit down together, for no more than an hour, and look at how well your life insurance is working for you. I believe you will find that, given the peace of mind that comes from knowing your coverage continues to align with your needs, this brief time investment will yield considerable rewards.

Please give my best to [spouse name], as well as to [children's names]. I look forward to speaking with you soon.

Regards,  
[your name]

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No bank or credit union guarantee | Not FDIC/NCUA/NCUSIF insured

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