Date

Client Name

Address

City State Zip

Dear Client,

In today’s fast-changing world, one of the most important services I provide for my clients is a regular review of their financial needs and objectives. I would like to offer you a complimentary **Life Insurance Review**.

According to my files, we have not recently completed this type of review, and I think you could benefit from this service.

Why do I think this is important?

Financial needs, goals and situations change. Our review can help ensure your life insurance strategy is keeping pace with your changing needs and objectives. The enclosed brochure outlines what your free review may uncover.

I look forward to meeting with you and will be calling you soon to schedule an appointment. If you have any questions in the meantime, please contact me.

Sincerely,

Financial Representative