

Dear [client name]

Let's bring clarity to your life — starting with your life insurance.

As with any asset, your life insurance coverage should be reviewed periodically. You want to be sure that the coverage you may have purchased before is consistent with who and where you are now.

Frankly, life changes. And the reasons for having a specific amount or type of life insurance may have changed, too. For example, you may have bought life insurance for family protection, but now, estate liquidity or supplemental retirement income is more important. Changes in career, family situation, and market strength can all affect your plans.

Whatever the reasons, it's a good idea to review your current policies to make sure your life insurance is on track to meet your goals.

That's why I'm pleased to offer you a free Life Insurance Professional Analysis and Review (PAR). An objective process for assessing your options, PAR is an easy way to bring clarity to your life insurance picture. If your needs have not changed and are being appropriately met, you enjoy the comfort of affirming your current coverage. If your needs have changed, I can offer suggestions to bring your life insurance in line with your goals.

I'll call you in the next few days to schedule a time for us to analyze your life insurance needs. As always, it's a pleasure working with you.

Sincerely,