

Sample Client Pre-approach Letter (available as a Word merge document)

Planning by Design Series

[Date]

[Client Name]

[Address]

[City, State, Zip Code]

[Dear Client:]

You purchased your life insurance policy to meet your needs during a specific time. Your life may have changed, and, therefore, your life insurance needs may have changed as well. Life insurance, like any other financial asset, should be monitored and reviewed to make sure that it is performing according to your current goals and objectives.

I am pleased to offer you a review of your life insurance policy. This will consist of focusing on your current life insurance needs and determining what changes, if any, need to be made to your existing coverage. If your life insurance needs are unchanged, or are being met by your existing policies, you will have the comfort of affirming this. If not, I can offer you suggestions to help bring your life insurance policies in line with your goals.

I will contact you shortly to review the benefits of this program. The few minutes spent will be worthwhile.

Sincerely,

[Advisor Name]

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