

## Prospecting Letter: Existing Clients

### Performance Evaluation for Your Life Insurance Policy

Use this letter in cross-selling to your current client base. *Performance Evaluation* is a great entry way into the life insurance portfolios of your best clients.

(Date)

(Existing Client Name)

(Address)

(City, State, Zip)

Dear (Existing Client):

First, let me take this opportunity to thank you for your continued business. I enjoy working with you and consider you an important client.

Over the years, I have found that many of my clients own life insurance policies, often from various companies. One of the many services available as a client of (My Firm) is a **Performance Evaluation** of your current life insurance – a benefit we offer at no cost to you.

*Life insurance products are financial products that require periodic care.* Has your current product performed up to or exceeded expectations? Have those expectations changed since policy inception? Does the marketplace offer more efficient products?

Subjecting your life insurance portfolio to a formal performance evaluation process is an important, financially sound practice. Periodically reviewing the role life insurance plays makes a marked difference in your ability to reach your goals.

**Performance Evaluation** offers a free analysis of your in-force life insurance coverage, reviews your current needs, and integrates both with the best products the market has to offer. This is a professional service offered to you – free of charge – that will provide you with the analysis you need to make informed decisions.

In order to help you take advantage of this complimentary service, you may call me at (insert telephone number) to schedule an appointment. I will be contacting you over the next few weeks to ensure that you have received this letter and to see if I can answer any questions you may have.

Again, thank you for the continued trust you have placed in me and my services.

Sincerely,