

Prospecting Letter: Existing Life Insurance Clients

Performance Evaluation for Your Life Insurance Policy

Use this letter as a service your current clients come to expect from you and your firm. Use as a general follow-up and/or at *X-Number* of days prior to policy anniversary for your entire life insurance book of business.

(Date)

(Existing Life Insurance Client Name)

(Address)

(City, State, Zip)

RE: (Current Life Insurance Carrier, Policy #, Policy Date)

Dear (Existing Life Insurance Client):

One of the many services available as a client of (My Firm) is a **Performance Evaluation** of your current life insurance portfolio. In (Policy Year), you purchased a \$(Original Death Benefit) policy from (Current Life Insurance Carrier).

Life insurance products are financial products that require periodic care. Has this policy 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,