

Prospecting Letter: Group Health Clients
Performance Evaluation for Your Life Insurance Policy

Use this letter in prospecting to individual lives within your current group health plans. This is an effective way to market your firm's services, including *Performance Evaluation*, to a large number of people whom already do business with you.

(Date)

(Group Health Insurance Client Name)
(Address)
(City, State, Zip)

Dear (Group Health Insurance Client):

I'd like to thank you and (Company Name) for allowing me to be of service for your health insurance benefits. Until now, the majority of my discussions have been with (Company Name). I wanted to introduce myself and ask that you please call should you ever have any questions regarding the plan.

In addition, I'd like to personally extend my services, and the resources of (My Firm Name), to you and your family. (My Firm Name) is an independent insurance agency, which means we do not work for an insurance company... **we work for you**. We do extensive individual planning – life insurance, disability income, long term care insurance and annuities.

One of the many services available to our clients 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.

Please call, we're eager to assist you!

Sincerely,