

## Prospecting Letter: Prospective Clients

### Performance Evaluation for Your Life Insurance Policy

Use this letter in prospecting *Performance Evaluation* to individuals on your prospecting lists.

(Date)

(Prospective Client Name)

(Address)

(City, State, Zip)

Dear (Prospective Client):

You spend your life building a portfolio of stocks, bonds, and qualified monies. How often do you check on the performance of these financial products? Do you compare your current holdings to current market offerings? Do your investment goals change over time? If you're like most people, you've set up a periodic financial review process tailored to your individual needs. That's good financial practice.

*Life insurance products are financial products that require similar 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? **Has your life's plan changed?**

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.

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.

I will be calling you in the next few days to schedule a time for us to analyze your life insurance needs.

Sincerely,