

Policy Evaluation Program Sample Prospecting Letter

This letter is to be used with clients who purchased life insurance with a carrier that is now inactive. It can be used along with one of the customizable consumer fliers.

(date)

(Client First Name) (Client Last Name)

(Address 1)

(Address 2)

(City),(State) (ZIP)

Dear (Client Name):

When you purchased your permanent life insurance, you purchased a complex financial instrument designed to last a lifetime. Like all financial vehicles it should be monitored to make sure that it is performing as expected.

This is particularly critical for policies that were purchased from carriers that are no longer active in the life insurance marketplace. With the economic climate, strategic business decisions, and mergers and acquisitions, there have been many changes to the carrier population in the last decade. Many of the carriers currently servicing those policies are not keeping them competitive.

That is why I am excited to offer you a special policy evaluation program.

The goal of the evaluation program is to maximize the benefits of your policy. The service is offered as a courtesy to you. I will contact you shortly to review the benefits of this program. The conversation will take just a few moments of your time.

Sincerely,

(Insurance Professional Name)