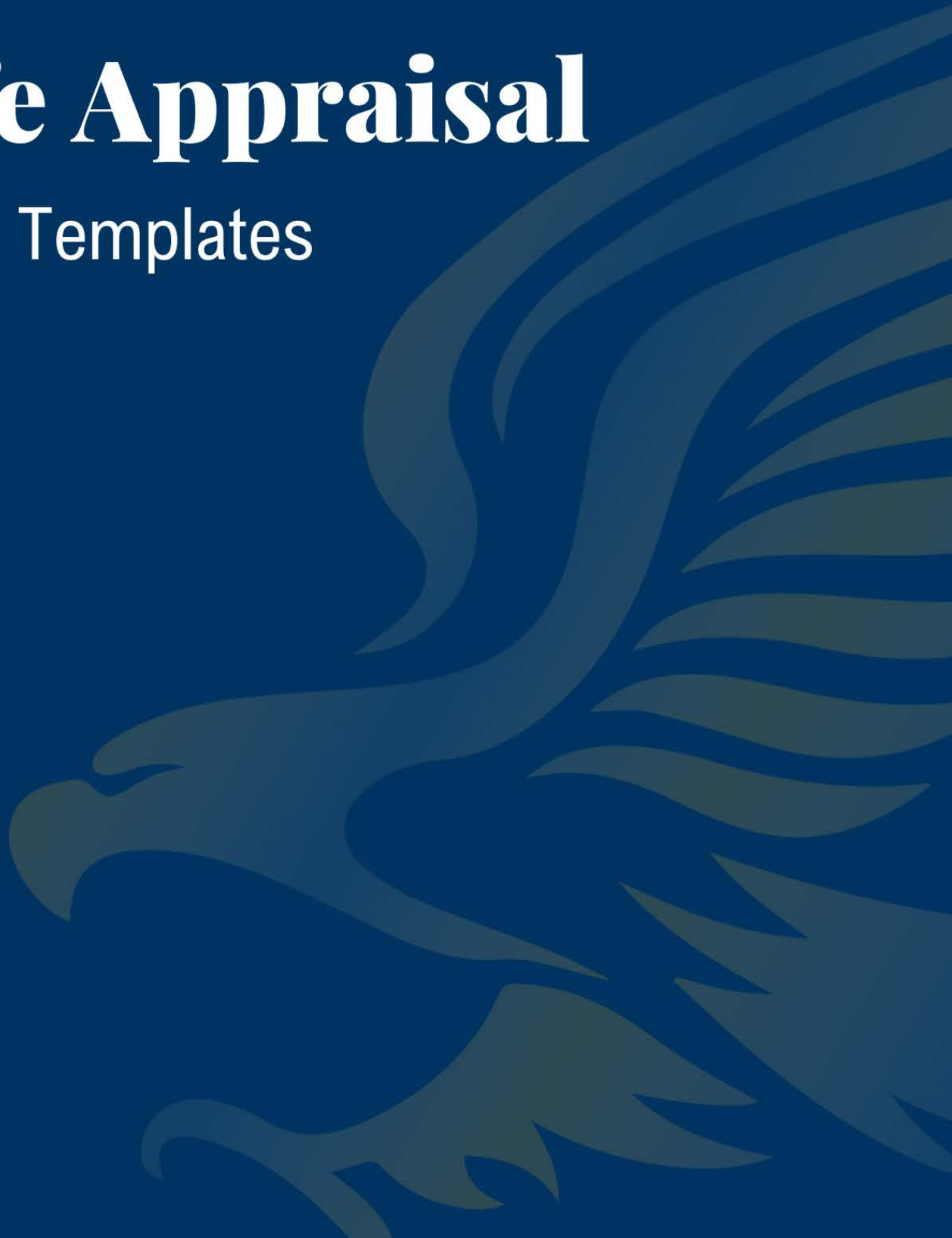




Life Appraisal

Email Templates



Overview of Templates

This life appraisal email series is designed to encourage clients to reassess their existing life insurance policies to ensure they align with current financial goals and priorities. Over time, life changes can impact financial needs, making it essential to evaluate the performance and relevance of life insurance products.

These emails provide clients with the opportunity to request a complimentary appraisal, helping them uncover hidden value and make necessary adjustments to their retirement plans. The series emphasizes the importance of adapting financial strategies to evolving circumstances, promoting peace of mind and financial security through expert advice and personalized service.



Email Best Practices

To maximize the reach and effectiveness of your email campaigns, focus on these four essential best practices:

Timing

While there are a variety of timeline strategies you could follow when it comes to email distribution, we recommend one of the following emails a week.

Know Your Audience

Understand the demographics, interests, and pain points of your recipients. Tailor your content to address their specific needs and concerns. Personalization can significantly increase open and click-through rates.

Clear and Concise Content

Keep your emails clear and to the point. Use concise language and break up text with headings, bullet

Strong Call-to-Actions (CTAs)

Every email should have a clear and compelling CTA, guiding your audience on the next steps, whether it's watching a video, contacting your team, or requesting more information. Make sure your CTA stands out and is easy to follow.

Monitor Analytics

Regularly check email analytics to understand what content is performing well and what isn't. Pay attention to open rates, click-through rates, and conversion rates. Use this data to refine your strategy and improve future campaigns.

Email #1

Subject Line

Life changes. Shouldn't your life insurance change with it?

Body

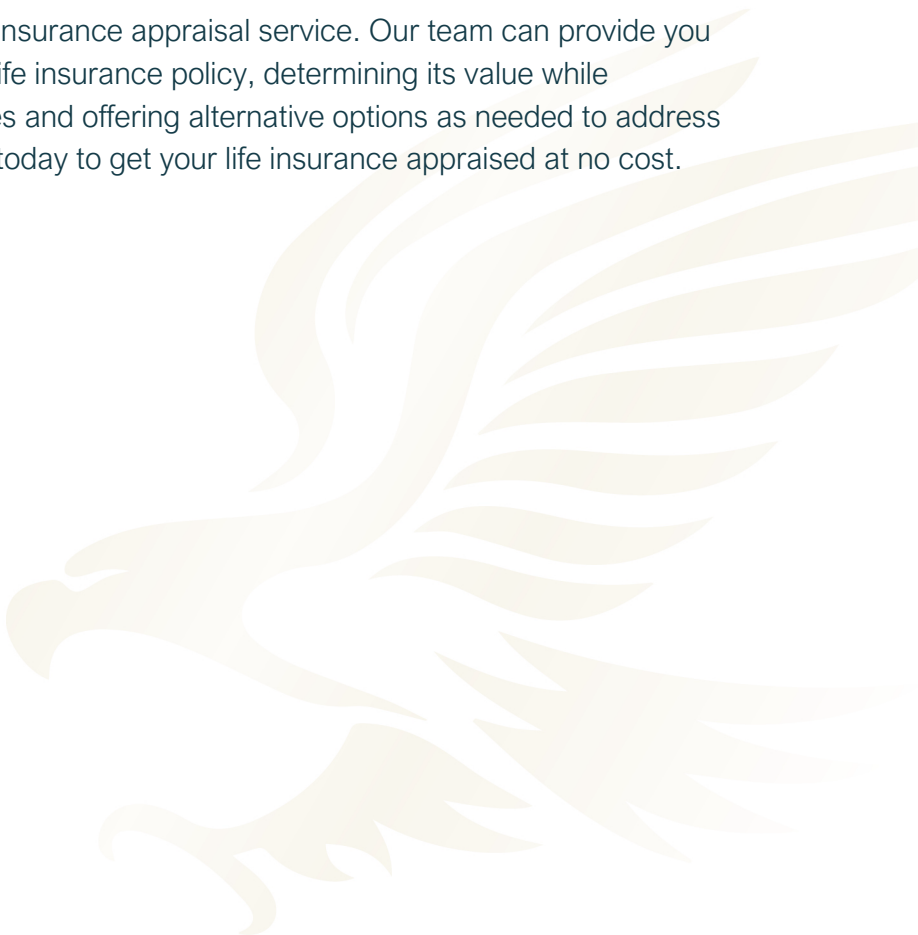
[Recipient],

The life you lived when you first purchased your life insurance policy might not be the life you're living now. Your needs, circumstances, and goals may have evolved as the years went on—the question is, has your life insurance evolved with them? If not, you could find yourself paying premiums on a policy that isn't even suited to you. That's where we come in.

We're excited to announce our new life insurance appraisal service. Our team can provide you with a complimentary appraisal of your life insurance policy, determining its value while pinpointing its strengths and weaknesses and offering alternative options as needed to address any issues that may pop up. Reach out today to get your life insurance appraised at no cost.

Email:

Phone:



Email #2

Subject Line

When's the last time you really took a good look at your current life insurance policy?

Body

[Recipient],

Have you considered getting it appraised?

[video goes below]

Reach out to today to get your life insurance appraisal set up.

Email:

Phone:



Email #3

Subject Line

Is your life insurance policy still relevant?

Body

[Recipient],

When you think back to how you lived when you first purchased the policy, does it match up with the life you're living now? You might have gotten married, had children, switched careers—so has your life insurance changed along with your life changes? Almost everyone can stand to benefit from a complimentary life insurance appraisal, so why put it off? Contact us today to schedule an appraisal session.

If you want more information on how a complimentary life insurance appraisal can benefit you, download this brochure: [\[brochure download\]](#)

Email:

Phone:

