# Client Appraisal Letter

August 4, 2022

[CLIENT NAME]

[CLIENT ADDRESS]

[CLIENT CITY, STATE, ZIP]

Dear [CLIENT NAME],

When you made the decision to purchase life insurance, the circumstances, needs, and goals that were present at the time the original policy was purchased played a significant role in the type of policy and coverage selected. Similarly, the circumstances, needs, and goals of the insurance carrier you bought your coverage from played a prominent role in the product they created for you.

With your evolved needs, a policy appraisal can help you pinpoint strengths, eliminate weaknesses, and even identify new opportunities that your current policy doesn’t address. Through this, we can help secure peace of mind for you and build better protection for your loved ones.

If you would like an appraisal of your insurance contracts, please fill out the attached worksheet and return it by mail. Or, you may forward a copy of your most recent statements to me via email at [ADVISOR EMAIL]. After we have appraised your policies, we will call you to discuss them in more detail.

Please do not hesitate to call me at [ADVISOR PHONE] if you have any questions or would like to discuss other ways I can help you address your financial goals.

Sincerely,

[ADVISOR NAME]

[ADVISOR TITLE]