



[DATE]

[CLIENT NAME]

[ADDRESS]

[CITY], [STATE] [ZIP]

Dear [Mr./Ms.] [LAST NAME]:

As a valued client, I wanted to let you know about a complimentary service that I'm offering.

When you purchased life insurance, you made a commitment to protecting your family, business, and possibly your estate. But when was the last time you reviewed your policy?

As a service to clients, I'd like to offer you an insurance checkup to make sure that your current policy or policies are still in line with your overall financial goals and family situation.

Many things can affect your ongoing need for life insurance—an addition to the family, a change in marital status, or business-related changes. However, most of us never take the time to review our policy or policies after we buy them.

What's involved in a policy checkup? Basically, we'll review your current coverage, assess any life changes that have taken place since it was issued, and determine if your insurance still meets your financial goals.

Getting started is easy. Contact me and we can schedule a consultation and complete your checkup.

I hope you will take advantage of this opportunity to review your coverage by contacting me at your earliest convenience at [phone number]. Remember, there is no charge for the insurance checkup, so call today.

Thank you for your continued trust.

Sincerely,

[NAME]

Life insurance policies issued by Transamerica Life Insurance Company, Cedar Rapids, IA 52499. Policies may not be available in all jurisdictions.