

## Onboarding | Policy Renewal - Commercial

### **S: It's time to review your {Policy Type} policy**

Hi {Customer Name} ,

Hope all is well.

It's almost time for your {Policy Type} policy review. This review is a great opportunity to ensure that your policy still provides your coverage needs.

Can you please reply to this email with answers to the following questions:

- Has the number of employees changed?
- Has the name of your business changed?
- Have you restructured your company's ownership (e.g., gone from sole proprietorship Y ? N ? to LLC or corporation) or added any DBA's (doing business as)?
- Has your business changed owners, partners or officers?
- Has the nature of your business operations changed?
- Have you changed or expanded the types of products you sell and/or services you offer?
- Have you added new locations, expanded into new states?
- Have you closed or moved any locations?
- Has the mailing address of your business changed?
- Has the physical location of your business changed?

It's really important that we get a list of any updated as soon as possible. We greatly appreciate your business and look forward to serving you for a very long time!

{Agent Name}  
{Agent Phone Number}  
{Agent Email}  
{My Agency Name}

