

Onboarding | Policy Renewal

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

Hi {Customer Name} ,

It's 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:

- Have there been any changes with your employment?
- Have there been any changes to your marital status?
- Do you have any new toys? (motorcycle, boat, cars, etc)
- Did you have any life insurance/mortgage protection outside of work?
- Has there been any new changes to your address or contact info?

We greatly appreciate your business and look forward to serving you for a very long time!

Thank you,

{Agent Name}

{Agent Phone Number}

{Agent Email}

{My Agency Name}

