

POLICY EVALUATION PROGRAM

SAMPLE PROSPECTING LETTER

This letter is to be used with those clients who purchased their existing life insurance through you. It can be used along with either one of the customizable consumer flyers.

(Date)

(Client Name)

(Address 1)

(Address 2)

(City, State, Zip)

Dear (Client Name),

When you purchased your permanent life insurance, you purchased a complex financial instrument designed to last a lifetime. Like all financial vehicles it should be monitored to make sure that it is performing as expected.

That is why I am excited to be able to offer you access to the Policy Evaluation Program. This program will provide you with a review of your current permanent life insurance policy. It is designed to compare the actual performance of the policy to what had been planned for when you originally purchased the policy.

The goal of the Policy Evaluation Program is to help ensure that your policy is performing as originally intended. The review is offered as a service to you.

I will contact you shortly to review the features of this Program. The conversation will take just a few moments of your time. I think you will agree that it will be time well spent.

Sincerely,

(Producer Name)