

Dear [CPA]

Like any asset, your clients' life insurance policies should be reviewed periodically. You want to be sure that the coverage they may have purchased before is consistent with who and where they are now.

In many instances, policies may not have been accumulating in value as well as or remaining in-force as long as you expected.

Whatever the reasons, it's a good idea to review your clients' current policies to make sure their life insurance is on track to meet their goals.

That's why I'm pleased to offer a free Life Insurance Professional Analysis and Review (PAR) for your clients. An objective process for assessing insurance options, PAR is an easy way to bring clarity to the life insurance picture.

If your clients' needs have not changed and are being appropriately met, they'll appreciate an affirmation of their coverage. If they are not, I can offer suggestions to bring their life insurance in line with their goals. I'll call you in the next few days to answer any questions and to see if a complimentary analysis would be helpful for your clients.

I look forward to assisting you and helping to bring added value to your clients.

Sincerely,