

[Date]

[First Name Last Name]

[Address]

[City, State Zip]

Dear [First Name Last Name],

**Looking forward to serving you**

My name is [Agent Name] and I am your new Transamerica insurance agent. I look forward to giving you the responsive, personal service you expect.

To that end, it’s time for your complimentary, no-obligation policy review. Though you may have no need for additional insurance at this time, a periodic review gives you an opportunity to confirm your insurance policy will still accomplish what you want it to do.

However, I have been unable to contact you by phone. Would you mind giving me a call at [**xxx-xxx-xxxx**] so I can update our records and arrange a convenient time for us to meet in person?

Thank you.

Sincerely,

[Agent Name, business title]

[Office]

[Address]

[Phone Number]