

Personalized Spring Cleaning Letter Template



Easily customize this letter template to stay connected with your clients! Share insurance tips, personal updates, or simply check in to stay top of mind and build lasting relationships.

WHAT'S INCLUDED:

Page 2: Editable letter template

DIRECTIONS:

1. Open this file in Adobe Acrobat or Canva.
2. Replace images with your logo and/or headshot.
3. Print your letter and put it in a stamped envelope to mail to the buyers and sellers in your local area!



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hello

FROM YOUR LOCAL INSURANCE EXPERT!

Dear Friend,

As your local insurance advisor, I like to keep clients and community members informed—not just when it's time to renew a policy, but also when there are opportunities to stay better protected and more prepared for life's "what ifs."

Even if you haven't made major life changes recently, spring is an ideal time to revisit your insurance coverage and make sure it still fits your current needs. A quick check-in now can help prevent bigger issues down the road and give you peace of mind knowing you're covered where it counts.

Here are 8 simple ways to clean up your insurance coverage this season:

1. Update passwords on all insurance-related accounts for added security
2. Review and update beneficiaries on your policies
3. Make sure your coverage limits still align with your lifestyle, assets, and family needs
4. Update your home inventory using apps like *Itemopia* or *Sortly* to stay prepared for claims
5. Report any recent renovations or upgrades to your insurance—these can affect the value of your home and your coverage needs
6. Ask your provider about potential discounts for bundling, eco-friendly upgrades, a claim-free record, or annual payments
7. Review your auto insurance mileage—if your commute has changed, updating your estimate could reduce your premium
8. Consider storing digital copies of your insurance policies, IDs, and emergency contacts in the cloud or on a secure drive

If you're unsure whether your current policies still fit your needs, I'm offering complimentary insurance consultations this spring. Whether it's reviewing your coverage, identifying potential savings, or preparing for future milestones, I'd be happy to help.

Feel free to reach out with any questions or to schedule your review—I'm here to help you feel confident, protected, and informed.

Warmly,

STACEY SHANNER

INSURANCE AGENT | 555-555-0000 | EMAIL@REALTOR.COM

Want an Even More Powerful Way to Stay in Touch?

Sending personal letters is a great way to nurture relationships—but what if you could send something that makes an even bigger impact?



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- ✓ Look impressive and professional
- ✓ Include a fully customizable letter on the inside front cover

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What Professionals Are Saying About Personalizing Their Magazine:

★★★★★ *"Any new prospect requesting a mailing with brochures finds the latest issue in an envelope along with my personal letter and insurance materials."*

— Daniel Mullin, Insurance Agent