

Sample Review Introduction Letter

For: Banks / Trust Dept / Attorneys / Accountants

February 23, 2011

Valued Client
Address1
Address2

Re: Annual Life Insurance Review

Dear Valued Client:

Bank XYZ wants to take this opportunity to notify you of a new service which <<Bank XYZ's Trust Department>> is initiating on behalf of our clients.

We believe that one of the key fiduciary responsibilities of any trust department is to conduct a periodic review of our clients' in-force life insurance policies in which our trust department has an advisory capacity to ensure that your policies are performing at competitive levels.

In keeping with these fiduciary responsibilities, we would like to request an in-force illustration of your current life insurance policies which are owned by the trust(s) created and administered at <<Bank XYZ>>. The purpose of this review is to make sure that these policies are not only fulfilling their initial purpose relative to your overall financial needs and goals, but to also determine whether they are doing so in the most cost-effective way possible. Please be advised, however, that no action will be taken without your direct approval and there are no fees or obligations for evaluating your current life insurance policies.

As a part of this life insurance review process, our office will be contacting you to answer any questions you may have and to find a convenient time that we can sit down and go through your life insurance policies.

We thank you for your business, and encourage you to call us at any time if you have questions about this valued-added service.

Sincerely,

<<Trust Officer's Name>>