# **Order execution – Insurance**

Hello <<CLIENT FIRST NAME>>,

<<PRODUCT INFO>>

Include basic information on the product you recommended such as insurance type and product name. Detailed information describing the product type is included in the client product brochure and is referenced elsewhere in this letter.

* Term
* Permanent life
* Universal life
* Participating whole life
* Critical illness
* Long term care
* Personal health

<<DESCRIBE HOW THE PRODUCT WILL MEET CLIENT’S NEEDS>>

Include a paragraph to explain why this particular solution can address the client’s needs.

<<A note on Mutual Funds>>

If you are licensed to sell Mutual Funds, please include the following in the opening paragraph “This letter does not address any mutual fund solutions we may have discussed.”

Thank you for meeting with me to discuss your financial future. .

When we met, you requested a <<TYPE OF POLICY>> life insurance policy, in the amount of <<FACE AMOUNT>>. The product is called <<PRODUCT NAME>> and is offered by <<NAME OF INSURER>>.

I have submitted an application for this product, on your request.

This policy can meet your insurance needs by <<DESCRIBE HOW THE PRODUCT WILL MEET CLIENT’S NEEDS e.g *This 20-year term policy for $500,000 corresponds to the term and amount of your mortgage*>>. Enclosed is a copy of the client product guide where you can read more details about this product.

If any of this information about you or your insurance needs is not correct, please let me know right away.

Please keep this letter with your personal papers as a reminder of why you have the policy.

I appreciate your trust in me to help you find the right solutions for you. If you have any questions about your policy, please contact me at <<CONTACT PHONE NUMBER AND EMAIL>>. I’m happy to help.

Thank you,

<<ADVISOR NAME>>