

Client Focus Connections
241 Market Ave
Port Edwards, WI 54469
Office 877-692-3400 Fax 715-887-4039
Email cfc@wctc.net

Hi, my name is _____ . I'm calling on behalf of your new agent _____ with _____ Insurance.

I'm following up on a letter that _____ recently mailed you letting you know that he/she has been assigned to take care of your insurance policies (now that _____ has retired from _____ Insurance. _____

_____ would like the opportunity to meet you and review your current coverage's to make sure you have the proper coverage amounts and necessary endorsements.

Can I have _____ call you to set up a time to meet with you to over your current coverage's?

YES – When is a good time for _____ to reach you? (daytime #)

NO – Are there any other insurance needs that _____ can help you with at this time?

Thank you and have a good evening.

OFFICE LOCATION

_____ office is located _____
