



**INSURANCE
SERVICES LTD.**

Dear _____,

Based on our previous meeting/s and discussions, I am recommending that you purchase a

_____ insurance policy offered by
[type of policy and coverage]

[insurance company]

On our first meeting, when we did the Fact-Finding Questionnaire and Life Needs Analysis, you indicated that you are (check all that applies):

- | | |
|--|--|
| <input type="checkbox"/> Young and healthy | <input type="checkbox"/> Wanting more investment options |
| <input type="checkbox"/> Expecting a child | <input type="checkbox"/> Nearing retirement |
| <input type="checkbox"/> The sole income earner | <input type="checkbox"/> Wanting income protection at the time of disability or critical illness |
| <input type="checkbox"/> Paying off a mortgage | <input type="checkbox"/> Wanting better security for your child's/children's educational needs |
| <input type="checkbox"/> Wanting more financial security | |
| <input type="checkbox"/> Building up an inheritance | |
| <input type="checkbox"/> OTHER: _____ | |

This policy has been recommended to you because:

If any of this information about you or your needs is not correct, please let me know right away. If you have any questions about the policy or why I am recommending it, don't hesitate to ask me now or at any time in the future. You should also keep this letter with your personal papers as a reminder of why you have the policy.

ADVISOR SIGNATURE

DATE (MM/DD/YYYY)

CLIENT'S SIGNATURE

DATE (MM/DD/YYYY)