

Sample Reason Why Letter

Hello [insert client name]:

I am sending you this letter to follow up on our recent conversation. Specifically, I'd like to provide more information about the product recommendations, the transactions being completed, and related rationale.

Product details:

- Insurer:
- Product name:
- Type of insurance:
- Coverage or investment amount:
- Fee structure, if applicable:

This product is being recommended based on my knowledge of your needs and the facts that I have gathered from our conversations to date. In particular, this product will address [insert client need].

I am confident in this recommendation and its ability to address your needs. Moreover I am thankful for the opportunity to assist you, and look forward to our future interactions.

If you have any questions at all, please do not hesitate to contact me. I can be reached at [insert contact details].

Please keep a copy of this letter on file.

Sincerely,

[insert your name]