**SFS Advisors - This must be used in conjunction with preapproved firm letterhead that includes firm disclosure or preapproved email signature with firm disclosure.**

**Week 1 email template**

**Optional subject lines:**

* Let’s review your life insurance [policy/policies]
* Any changes since we last met? Let’s talk.

**Content:**

Hello [client name],

It has been a while since we last met and reviewed your [policy/policies], so I wanted to reach out to you.

If you’ve become a parent, bought a house or even changed jobs since the last time we talked, I would like to sit down with you and re-evaluate your life insurance needs.

Closing options A: I will be calling soon to schedule some time for us to meet. If you have any questions in the meantime, feel free to call me at (XXX) XXX-XXXX.

Closing option B:Give me a call at (XXX) XXX-XXXX to set up an appointment. I look forward to hearing from you soon.

[Advisor contact information]

**Disclosures:**

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

Life insurance products contain fees, such as mortality and expense charges (which may increase over time), and may contain restrictions, such as surrender periods.

This is a general communication for informational and educational purposes. The materials and the information are not designed, or intended, to be applicable to any person’s individual circumstances. It should not be considered investment advice, nor does it constitute a recommendation that anyone engage in (or refrain from) a particular course of action. If you are seeking investment advice or recommendations, please contact your financial professional.

**Not a deposit — Not FDIC/NCUA insured — Not insured by any federal government agency — Not guaranteed by any bank or credit union — May go down in value**

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