

01 Client Follow-Up Templates

Copy, personalize the bracketed fields, and send

These are ready-to-send email & text templates for common client follow-up moments. Replace the bracketed fields with the client's details and your own contact info before sending. More templates will be added here as they're developed.

USE WHEN A DRAFT FAILS

PAYMENT FOLLOW-UP (NSF / FAILED DRAFT)

SUBJECT LINE

Quick Follow-Up Regarding Your Policy Payment

Good morning [Client First Name],

I hope you're doing well! This is [Your Name], your insurance agent. I wanted to check in regarding your policy with [Carrier Name].

It looks like the company recently attempted to draft your monthly payment, but the transaction didn't go through due to insufficient funds. No worries — this happens from time to time, and we have a few simple options to get things back on track.

Please let me know what works best for you:

☒ Retry the payment immediately,

or

☐ Allow a brief grace period before the next draft

If neither of these options works, I'm happy to help you find a solution that better fits your schedule or budget.

Thank you for your time, [Client First Name], and for allowing me to assist with your coverage. I'm here to help make this process as smooth as possible for you.

Warm regards,

[Your Name]

Licensed Insurance Agent — Collective Prosperity Firm

[Your Phone] • [Your Email]

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USE AFTER APPROVAL

POLICY APPROVAL / WELCOME BREAKDOWN

SUBJECT LINE

Congratulations on Your Approval, [Client First Name]! 🎉

Hi [Client First Name],

It was such a pleasure helping you this past month and getting the chance to chat with you. I truly enjoyed our conversation!

I wanted to follow up with a full breakdown of your new [Carrier Name] life insurance policy details. Congratulations again on your approval — excellent choice!

You'll find attached: a copy of your policy application.

If you ever need to make any changes or have questions, please don't hesitate to give me a call. I'm always happy to help.

POLICY INFORMATION

INSURED

OWNER (IF DIFFERENT)

COMPANY / CARRIER

POLICY / APPLICATION #

POLICY TYPE

BENEFICIARY

POLICY AMOUNT

MONTHLY PREMIUM (LEVEL)

MONTHLY DEDUCTION DATE

Description: This is a permanent life insurance policy that provides a guaranteed death benefit and builds cash value over time.

Included Benefits: [List riders included on this policy, e.g. Terminal Illness Benefit Rider (Accelerated Death Benefit) — allows access to a portion of the policy amount if diagnosed with a qualifying terminal illness.]

If you don't already have one, you can easily create your own will for free here: doyourownwill.com

You can have it notarized at a UPS Store or by any legal notary.

Thank you again for allowing me to assist you — it was truly an honor to help protect your family's future.

Warm regards,

[Your Name]

Your Licensed Agent — NPN: [Your NPN]

[Your Phone] • Collective Prosperity Firm