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# Thank you.

Dear [CLIENT FIRST NAME],

Thank you for sitting down with me [on DATE / this week] to talk through your final expense plan. Deciding how those costs will be handled is one of the kindest things you can do for your family, and I'm glad I could help.

If any question comes up about your coverage — a beneficiary change, a billing question, or anything else — call me directly. You will always reach a real person who knows your file.

With appreciation,

[AGENT NAME]

Licensed Insurance Agent · License # [LICENSE #]

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[AGENCY NAME] · [PHONE]

[ADDRESS], [CITY, STATE ZIP]

# Know someone who’s been putting this conversation off?

Most of the families I work with are introduced by someone who trusts me with their own plan. If a friend or family member has been meaning to sort out how their final expenses would be paid, I’d be honored to have the same no-pressure conversation with them — free, and with no obligation to buy anything.

SOMEONE I’D LIKE YOU TO TALK WITH

NamePhone

NamePhone

Best way to introduce us (call, text, in person)

Hand this card back to me, mail it to the address below, or simply pass along my number: [PHONE].

Please share names only with the person's permission. If you do, a licensed insurance agent may contact them by telephone or mail about life insurance, and will mention that you suggested the introduction. Nothing is offered or paid in exchange for a referral.

EDITABLE DISCLAIMER: [AGENT NAME], Licensed Insurance Agent, License # [LICENSE #] · [AGENCY NAME], [ADDRESS], [CITY, STATE ZIP]. Life insurance products underwritten by [INSURER NAME]. [CONSULT COUNSEL: confirm your state's rules on referral requests and anti-rebating before offering any referral incentive.]