

Writing a Good Cover Letter

MAKE SURE THE FOLLOWING POINTS ARE DETAILED IN A COVER LETTER TO THE UNDERWRITER

HERE ARE SOME IDEAS TO HELP PAINT A CLEAR PICTURE OF YOUR CLIENT'S SITUATION, OR PUT POSITIVE SPIN ON A SITUATION THAT MAY OTHERWISE BE SEEN IN A NEGATIVE WAY:

WHO YOU ARE

YOUR RELATIONSHIP TO THE CLIENT

LENGTH OF TIME YOU HAVE KNOWN THE CLIENT

JUSTIFICATION FOR THE INSURANCE

TOTAL PERSONAL/BUSINESS INSURANCE IN FORCE

DETAILS OF ANY REPLACEMENT

ANY PERSONAL FACTS OR HABITS THAT MAY HELP THE UNDERWRITING DECISION

IF APPLICABLE, INCLUDE NAMES OF PEOPLE AT THE CARRIER WITH WHOM YOU'VE DISCUSSED THE CASE WITH - AND DETAILS OF THAT DISCUSSION. *** GET THIS DETAIL IN WRITING, IF POSSIBLE.