

Umbrella Insurance Proposal

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

We are pleased to present this umbrella insurance proposal designed specifically for retirees like you, who are focused on comprehensive protection during their estate planning process.

Overview of Umbrella Insurance

Umbrella insurance provides an additional layer of liability protection beyond what your existing policies (home, auto, etc.) cover. This means enhanced peace of mind knowing your assets are safeguarded against unexpected events.

Benefits for Retirees

- Increased protection for your savings and investments.
- Liability coverage that extends to your rental properties and personal assets.
- Defends against lawsuits that could jeopardize your estate plans.

Proposed Coverage

We recommend an umbrella policy with a coverage limit of [insert amount], which is designed to meet your specific needs and circumstances.

Next Steps

Please feel free to reach out to discuss this proposal further or to arrange a meeting. We are committed to ensuring you have the right coverage for your retirement and estate planning needs.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]