

EMAIL 1 — “*You’re Already In My Circle*” Approach

Subject: Wanted you to see this first

Hi [First Name],

You and I have worked together before, and you know I keep an eye out for anything that could bring added value to the people I serve.

There’s something I’ve started helping a few clients with recently, it’s called a **life settlement**, and it’s letting some seniors turn unneeded life insurance into **immediate cash**.

You may not need it, but if your policy has outlived its purpose or become too expensive, this could be a way to ease that burden.

Let me know if you’d like me to look into it for you. There’s no cost — just a quick check.

Talk soon,

[Agent Name]

Licensed Agent



Insert Your number



Insert Your calendar link

EMAIL 2 — “*Things Evolve*” Trust Builder

Subject: We've handled a lot together — this might help now

Hi [First Name],

Over the years, we've handled important parts of your insurance together and I've always aimed to bring you solid solutions when they matter most.

Now there's an option for clients who no longer need their life insurance, or who are tired of paying premiums that no longer make sense.

It's called a **life settlement**, and depending on the policy, it can turn your coverage into a **six-figure payout**.

If you want me to check what yours might be worth, I'll run it confidentially. No cost. No pressure. Just something to keep you informed.

Always here,

[Agent Name]

Licensed Agent



Insert Your number



Insert Your calendar link

EMAIL 3 — “*It's My Job to Watch for This*” Message

Subject: This could matter for your retirement game plan

Hi [First Name],

As your advisor, it's always my job to watch for changes that could help protect your future or give you more options.

Life settlements weren't on the radar a few years ago, but now, more clients are qualifying to **sell policies they no longer need** for serious payouts.

This could mean \$50,000, \$100,000, or more, depending on the case.

If your situation has shifted — or if you're curious whether this is worth exploring — I'd be happy to take a look. No strings attached.

Appreciate the trust,

[Agent Name]

Licensed Agent



Insert Your number



Insert Your calendar link