# INSURANCE RECORDS REQUEST EMAIL TEMPLATES

Use these ready-to-send emails to get the documents that belong to you and keep your business protected and informed

# **Why These Records Matter**

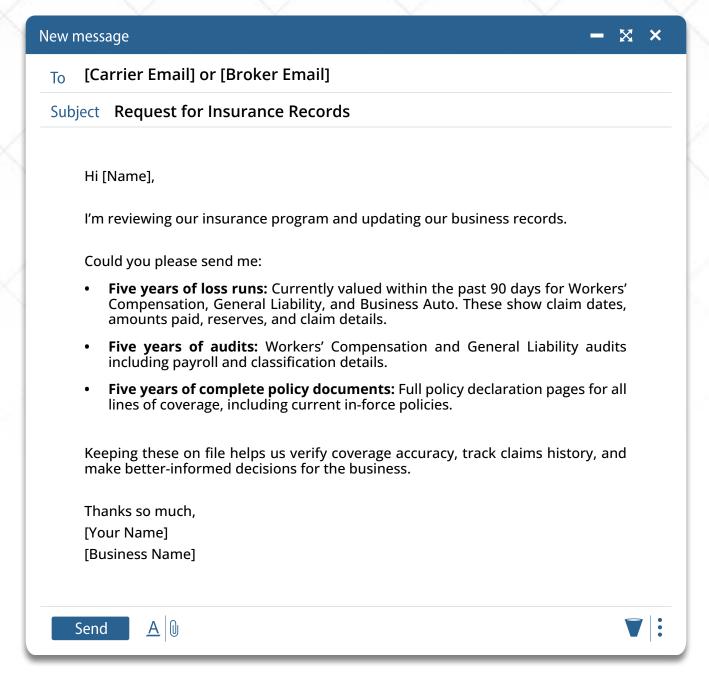
Your loss runs, audits, and policy declarations are the insurance equivalent of financial statements for your business. They belong to you — not the carrier or your current broker — and you have the right to access them at any time. Keeping these records on file is simply good business. They allow you to:

- Verify the accuracy of your coverage and claims history
- Compare options and negotiate more effectively
- Avoid delays or confusion during renewals or audits
- Take advantage of opportunities including captive programs when they arise

Even if you have no immediate plans to change your coverage or join a captive, having these documents on hand ensures you're making informed decisions with your insurance program.

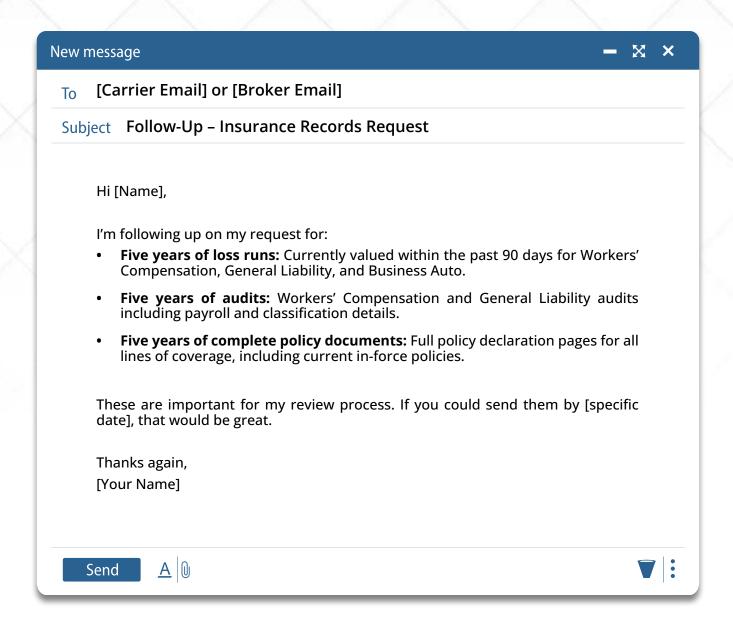


## **INITIAL REQUEST: CASUAL / WARM PROFESSIONAL**



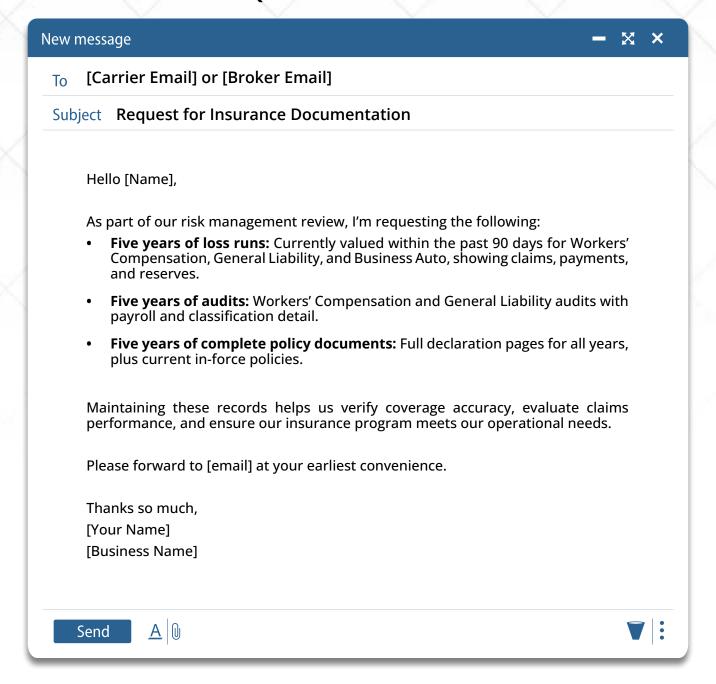


#### FOLLOW-UP: CASUAL / WARM PROFESSIONAL



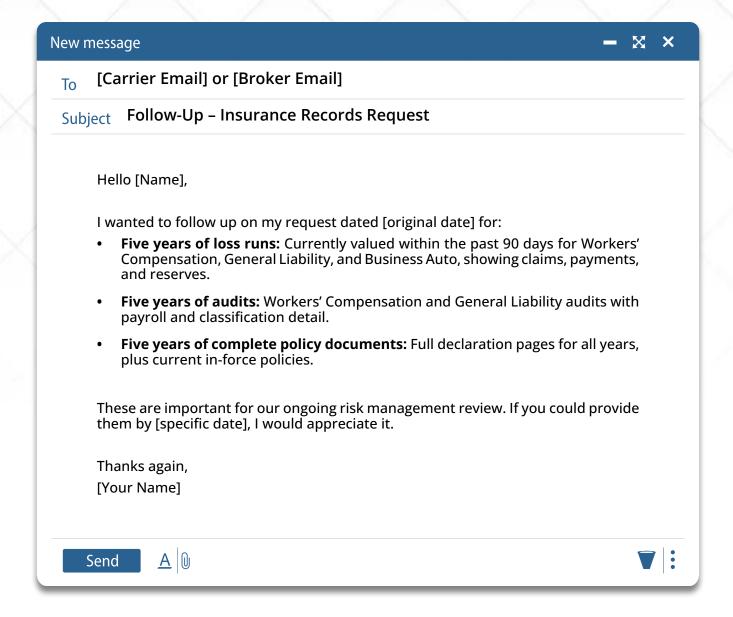


# **INITIAL REQUEST: MID-LEVEL PROFESSIONAL**



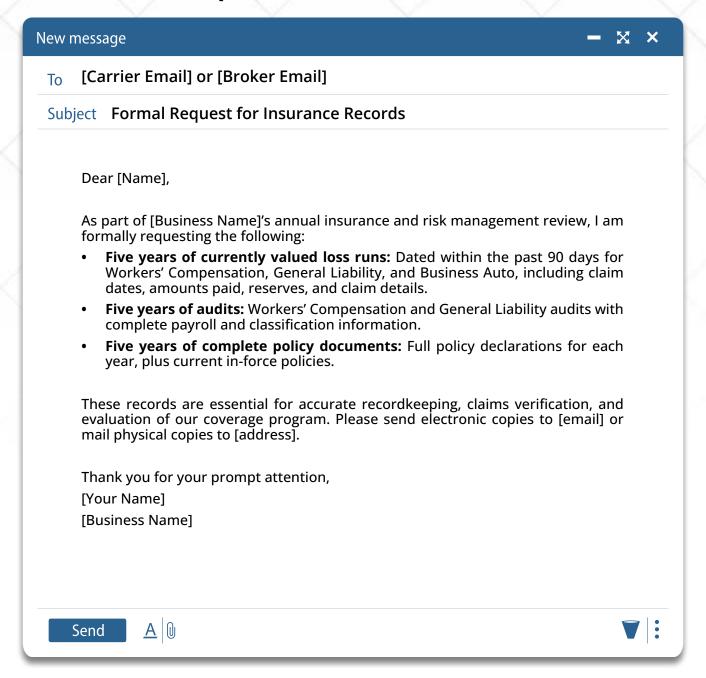


# **FOLLOW-UP REQUEST: MID-LEVEL PROFESSIONAL**





### **INITIAL REQUEST: FORMAL / HIGHLY PROFESSIONAL**





#### FOLLOW-UP: FORMAL / HIGHLY PROFESSIONAL

