

Annual Review : Sample Quiet File Letter

If you've read Building A Financial Services Clientele by O. Alfred Granum, CLU, you are familiar with the concept of the One Card System and the 1,000 Clients book. The basic principle is to proactively maintain your base of prospects and clients to a finite number, while simultaneously increasing the overall value of your client base (as defined by their total FPP – Future Premium Potential).*

If you are practicing this principle, you have a system by which you are regularly dead filing prospects and quiet filing clients. Below is a sample letter to send to a client you are quiet filing.

**A prospect is defined as someone on whom you've taken a fact finder.*

[Client Name],

I hope this letter finds you well. I am reaching out to you to let you know that based on my records and notes from our previous conversations, I don't feel as if it makes sense for us to continuously meet. Given the busy world we all live in, the last thing I want to become is a bother. Therefore, unless I'm missing something, my office will no longer be calling to meet on an annual basis.

Please be assured that I will always honor my commitment to provide you with world-class service. My team is available should you have any questions, or service needs, on any of the [company name] products you own.

I appreciate your business and wish you and your family good health and continued success.