

Client Renewal Advisory

Insurance

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Drafts a client-friendly pre-renewal advisory note — what is changing, recommendations and actions needed. Use it to advise a client ahead of renewal. To build the insurer negotiation behind it, use the Renewal Negotiation Brief.

Purpose of this tool & output

Draft a pre-renewal note for a client

How the output is used

Use the drafter to send a client a clear pre-renewal note on what changed, what to do and by when.

Important cautions

AI-generated draft; personalise and confirm quotes.

Companion documents

- Client Insurance Review Report
- Cross-Sell Opportunity Finder
- Risk Profile Questionnaire Builder
- Coverage Recommendation Report
- Insurance Proposal Generator

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.