

Subject: Quick Call on Behalf of [SOLD CUSTOMER]

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Hi [ERS LEAD],

My name is Michael Jacobs, and I'm [SOLD CUSTOMER]'s insurance agent. They asked me to reach out to you with some important information. I recently sent you a text and copied them in to confirm I've connected with you.

[Sold Customer] mentioned how much you mean to them, so I'd love to take just 10-15 minutes to share what they wanted me to pass along.

Would you be available for a quick call? Do mornings, afternoons, or evenings work better for you? I'm available on [Day] and [Day]—let me know what works best!

Looking forward to speaking with you.