1. Actuarial Follow Up

Subject: Elevate Your Business with Expert Actuarial Valuation Services

Dear [Client's Name],

I trust this message finds you well. Our dedicated team at Insights is ready and enthusiastic about supporting your actuarial valuation requirements with precision and professionalism.

Whether you are prepared to advance or if there are specific inquiries or concerns, you'd like to discuss further, we encourage you to reach out. Our commitment lies in delivering exceptional service and tailored actuarial solutions that align seamlessly with your unique business needs.

Are you ready to enhance your business strategy?

[Click here](https://insightss.co/request-for-proposal/) to request a complimentary proposal, meticulously tailored to address your actuarial needs and set the stage for unprecedented growth and efficiency: <https://insightss.co/request-for-proposal/>

Please feel free to respond to this email at your convenience.

We look forward to the opportunity to contribute to the success of your business.

Best Regards,

1. Actuarial 2nd Follow Up

Subject: Discover Exclusive Actuarial Valuation Services from Insights

Hi first\_name ,  
  
Allow me to shed light on the unique attributes that distinguish Insights in the realm of actuarial valuation services. As the fastest-growing Management Consultancy in KSA, we take immense pride in offering unrivaled expertise and innovative solutions meticulously tailored to address your distinct business requirements.

For a more in-depth exploration of our capabilities and our remarkable client portfolio, please visit our website: [https://insightss.co/.](https://insightss.co/)

Should you have any inquiries or a specific area of interest you'd like to delve into like the valuation requirements, timelines, or deliverables etc., please do not hesitate to respond to this email. We are here to provide you with the insights that drive your success.

Best Regards,

1. **If the client approves to get Actuarial Valuation (Asks for proposal/quotation)**

**Subject**: Proposal – Actuarial Valuation – Year – Client Name

I hope this message finds you well.

We appreciate your interest in our Actuarial Valuation Services, and we are excited about the prospect of working with [Client's Company Name]. Thank you for considering Insights for your actuarial needs.

To proceed with providing you with a comprehensive proposal tailored to your specific requirements, we kindly request you the following information:

Please provide the following details at your earliest convenience:

* Full Name of the Company:
* Person to be Addressed in the Quotation:
* Designation of the Person to be Addressed:
* Total Number of Employees as at the Year End:
* Year-End Date of the Company:
* Does your company practice IAS-19 or Section 28 of IFRS for SMEs for actuarial purposes?

Once we receive this information, our team will analyze the data and draft a proposal that outlines the scope of our Actuarial Valuation Services, along with a breakdown of the associated costs.

We look forward to the opportunity to work with [Client's Company Name] and contribute to the success of your actuarial initiatives. Thank you for your time and cooperation.

Best regards,

1. **If the client Wants an understanding of the Actuarial Process (Asks how Insights is going to execute it)**

**Subject**: Process Overview for Actuarial Valuation Engagement – Client Name – Year

Dear [First Name],

I trust this email finds you well.

We are thrilled about the prospect of working with [Client's Company Name] on the Actuarial Valuation engagement. Thank you for choosing Insights as your partner in this endeavor.

As you inquired, I wanted to outline the key steps in the process:

* **Quotation / Proposal Approval**:

Upon approval of the quotation from your end, we will proceed to formalize our engagement through an Engagement Letter. This document outlines the terms and conditions of our collaboration. Once received, we kindly request you to review, sign, and share the signed copy with us.

* **EOSB Data Template**:

Following the completion of the Engagement Letter, we will provide you with an EOSB (End of Service Benefits) data template. This template is designed to capture essential information necessary for the actuarial valuation. You will fill in the required fields and return the completed template to us.

* **Data Evaluation and Queries**:

Our team will carefully evaluate the provided data. In case of any queries or clarifications needed, we will promptly communicate them to you. Resolving these queries efficiently is crucial for the accuracy of the valuation.

* **Initiation of Valuation:**

Once all data-related queries are resolved and the necessary information is complete, we will initiate the actuarial valuation process. Our team will work diligently to ensure a thorough and precise assessment.

* **Disclosures and Invoice Settlement**:

Upon conclusion of the valuation, we will share the Actuarial Report with you. It's important to note that the release of the report is contingent upon the settlement of the invoices for the actuarial services provided.

If you have any questions or require further clarification at any stage of this process, please do not hesitate to reach out.

Best Regards,

5. **Scheduling Meeting with the client (If the client has further misunderstandings)**

Subject: We need to schedule an appointment

Dear first\_name

I hope this email finds you in great spirits. I would be delighted to discuss your specific needs and how we can tailor our services to meet your current requirements. Please let us know a convenient time for you, and we can arrange a meeting or a call at your earliest convenience. We can share a proposal to offer actuarial valuation services for the year ending 2023 at an exceptional price.

If there are any specific topics you would like to focus on during our discussion, please feel free to share them beforehand, and we will ensure that our team is well-prepared to address your concerns.

Thank you for considering Insights as your financial partner. We are looking forward to the opportunity to work together and contribute to the success of your business.

Kind Regards,

6.

Subject: Scheduling a Consultation to Elevate Your Business

Dear first\_name ,

I hope this email finds you in great spirits. We appreciate the opportunity to connect with you and discuss how our financial services and management consultancy expertise can benefit your business.

I would like to propose scheduling a consultation to delve deeper into your specific requirements and explore the tailored solutions we can offer. Below are a few suggested time slots for our meeting:

1. **Option 1:** Date: [Proposed Date] Time: [Proposed Time]
2. **Option 2:** Date: [Alternative Date] Time: [Alternative Time]

Please let me know which option works best for you, or if you have an alternative time in mind. We are flexible and will accommodate your schedule.

Thank you for considering Insights as your financial partner. We are looking forward to the opportunity to work together and contribute to the success of your business.

All the best,