

Dear <First Name> <Last Name>,

Thank you for your continued trust in me as your source for all things Medicare! I am always here to answer any questions you have about your coverage and to provide you with the exceptional customer service you deserve. As your trusted Health Insurance Agent, I am excited you help you get the benefits you are eligible for.

A lot can happen over the year and I wanted to take this opportunity to update client records in preparation for annual reviews later this year. By updating your drug list, providers, and contact information now, we can save time during the annual enrollment period later. These updates will allow us to effectively explore your options to find a plan that works for you, including Medicare Advantage, Medicare Supplement, and Part D Prescription Drug Plans.

Updating your information is an important step to making sure you are not missing out on any benefits that are available to you. Please take a few minutes to give me a call or email me to update your information.

I appreciate your time, and I look forward to continuing to assist you with all your health insurance needs.

Sincerely,

<Agent Name>

Licensed Insurance Agent

<Agent Phone Number>

<Agent Email Address>

<Days and Hours of Operation>