

Hello:

One of the best ways to start getting leads for Medicare sales is to inform your book of business that you are now certified to sell Medicare plans. Your current clients already have a relationship with you and are the most likely to meet with you or refer business to you. Many agents have asked us for a sample email they could use to send to their current clients. We have included an example of an email below. Please adjust the email to best fit your needs.

You should consider the following items when drafting your letter:

- State that you are happy/thankful for their business
- Remind them that you have been assisting them for years
- Remind them that they have trusted you to help them with your current line of business
- Ask for referrals
- **Send this letter to EVERY client regardless of their age!**

SAMPLE LETTER

Dear Mr. & Mrs. Jones:

As valued clients of Smith Insurance, we wanted you to know that Smith Insurance is now certified to assist seniors with their Medicare health insurance needs. You have trusted us to help you find insurance that meets your individual needs and it is our pleasure serving you. Now, we invite you to find out more about Medicare health insurance options. Even if you are not currently in need of Medicare insurance, you most likely have friends or family who could benefit from this information.

As with many areas of insurance, deciphering Medicare plans can be confusing. That's where we can help. We will explain the available Medicare insurance options to ensure the best possible health care coverage is obtained. We offer these services at no cost and are confident we will be able to answer your Medicare plan questions.

There is one time a year when seniors can change their Medicare plan and that time ends on December 7th. If you are interested in receiving more information or if you have family or friends who might need assistance navigating Medicare health insurance options, please call us at _____.

Thank you,

John Smith
Smith Insurance