Dear Client,

We have found that many of our clients nearing retirement have questions about Medicare. ***Did you know… It is important to learn about Medicare as soon after your 64th birthday as possible.***

If you are an internet savvy person, online may be a natural direction for your research; however, visiting Medicare Q&A sites will put you on numerous call lists for solicitation calls from high volume Medicare Supplement Insurance Agents.

To provide extra value to our clients nearing retirement, we work with a Medicare Specialty Team at HTA. Together with HTA, we take the time to learn about your timeline for retirement to provide insight on how your Medicare OnBoarding will look, what is needed, appropriate time to apply (before or after retirement), and the best practices for a smooth process.  When the time is right, we can also shop Medicare Supplements, Prescription Plans and a Dental & Vision Plans.

We want to make sure you receive the best service possible learning about Medicare and transitioning to Medicare coverages.  Please contact me at insert phone number to set up an appointment.  There is no fee for this VIP service!

Sincerely Yours,

Agent or Financial Advisor