

Template
Referral letter to “Medicare” Clients

Dear Mr. & Mrs. Jones:

As a valued client of Smith Insurance, we/I want to take a moment to thank you for your business! You have trusted us/me to help you find Medicare health insurance that meets your needs and it is our/my pleasure serving you.

As you may have experienced, deciphering Medicare plans can be confusing. You most likely have friends or family who could benefit from learning more about the available Medicare health insurance options.

We/I would be honored to assist anyone you refer to us/me and we/I will ensure they also obtain health care coverage that meets their needs. As always, we/I offer these services at no cost or obligation.

If you know someone who is interested in receiving more information or who might need assistance navigating Medicare health insurance options, please have them call us/me at

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Thank you,

John Smith
Smith Insurance