MILESTONE MARKETING®

Client Letter: Age 65 Medicare Sign Up

mfs.com

Uncovering new opportunities with existing clients

Make sure your clients understand their Medicare options on or before their 65th birthday.

Opportunities to target include working with clients' CPAs to execute drawdown strategies. Please keep in mind your clients' financial needs, goals and risk tolerance.

1. Go to mfs.com
> Click Practice Management
> Click Milestone Marketing
> Client Prospecting Letter: Age 65

2. Copy and paste the letter onto your computer and then print it on your letterhead.

3. You can also paste the letter into an email using a subject line such as "Let's start planning your retirement benefits."

Changes cannot be made to the text other than to insert the date, salutation, contact information and closing. This piece may need to be reviewed by your compliance department.

Dear [**Insert name**]:

Within the next few months you will turn age 65. Congratulations!

It is important that you understand your Medicare options on or before this milestone birthday.

[**I will call you to discuss/Call me today to learn more about**] what this means and how we can continue to shape your retirement plan.

I look forward to speaking with you soon.

Sincerely,

[**Your name**]

[**firm**]

[**phone number**]

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