Book of Business Letter (with Meetings Info)

Dear Valued Client,

I’d like to inform you that as my current client, you’ve been identified as a potential match for a new program that is available for you in your area.

As your trusted agent, it is my responsibility year after year to provide you with all your options that may be most suitable for your current needs.

I’m excited to let you know that I now represent a PACE program that is designed to offer more quality care to my clients who may be low income, chronically ill, or a disabled veteran.

The program is designed to keep you living safely at home for as long as possible. It will provide you with a higher level of care than you may not be getting now. The program is All-Inclusive, meaning that all of the following benefits are included:

* Complete Healthcare
* Prescriptions
* Unlimited In-house Transportation
* Over-the-counter Medications
* Medical Equipment & Supplies
* Meals
* In-home Support & Medical Services
* Quality Dental Care
* Vision, including Eyewear
* Hearing Aides
* Physical/Occupational/Speech Therapy/Safety Devices
* Social Engagement, Recreational Activities
* Personal Emergency Response system
* Dedicated Social Worker to assist with future housing needs to give you peace of mind.

It’s put together with you in mind – **all in one place,** through one local PACE provider.

Please join me at one of my in-person meetings to learn more. Transportation is available.

Date: Time:

Location:

Date: Time:

Location:

Please call (XXX-XXX-XXXX) to reserve your spot, and if necessary, to arrange transportation.

Your advocate,

Broker Name, and Agency

License #

phone number email website