

[Sender Name]
[Sender Title/Company]
[Sender Address]
[Phone Number]
[Email]

[Date]

[Client Name]
[Client Address]

Subject: Retirement Transition and Comprehensive Coverage Check-In

Dear [Client Name],

As you approach your upcoming retirement, I would like to schedule a formal check-in to ensure your transition is seamless and your coverage remains comprehensive. Moving into this new phase of life often requires adjustments to financial, health, and insurance plans to align with your new lifestyle and income structure.

During our meeting, we will review the following:

- **Health Insurance & Medicare:** Transitioning from employer-sponsored plans to private or government-subsidized options.
- **Income Protection:** Evaluating your pension, Social Security, and investment withdrawal strategies.
- **Asset Protection:** Reviewing life, home, and auto policies to reflect changes in usage and value.
- **Legacy Planning:** Ensuring beneficiaries and estate documents are up to date.

My goal is to provide you with peace of mind so you can focus on enjoying your retirement. Please let me know your availability for a brief call or meeting next week. I have included my calendar link below for your convenience.

[Insert Calendar Link/Proposed Time]

I look forward to helping you navigate this exciting milestone.

Sincerely,

[Sender Signature]

[Sender Printed Name]