[Date]

[Recipient Name]
[Recipient Address]
[City, State, Zip Code]

Subject: Important Information Regarding Your 65th Birthday Milestone

Dear [Recipient Name],

I am writing to you today because our records indicate that you will soon be celebrating your 65th birthday. This is a significant milestone, and I would like to be among the first to wish you a very happy birthday!

Turning 65 often brings about important changes and decisions, particularly regarding your retirement benefits and Medicare eligibility. Navigating these options can sometimes feel overwhelming, but it is a great opportunity to ensure your future health and financial plans are securely in place.

As you approach this transition, I would like to offer my assistance in reviewing your current situation. Whether you have questions about enrollment timelines, plan options, or how this milestone impacts your current coverage, I am here to provide clear and helpful information.

I will follow up with you in the coming weeks to see if you have any questions. However, if you would like to speak sooner, please feel free to reach out to me directly at [Phone Number] or [Email Address].

Congratulations again on this upcoming milestone. I look forward to connecting with you soon.

Best regards,

[Your Name]
[Your Title]
[Your Company Name]