



[Add date]

[Add business name and address]

You can customize the greeting, or any part of this letter.

Dear Valued Client,

It's August, so December may seem far off; however, now's the perfect time to start thinking about your upcoming renewal.

Did you know? About 75% of companies in California go through their open enrollment in the 4th Quarter. That creates a bottleneck at the carrier for processing employee changes, receiving new ID cards, and billing issues. Not to mention if you decide to make a carrier change, then the underwriting and approval processes are delayed and normal turnaround times are doubled.

For this reason, I would like to get a jumpstart on this year's renewal by starting the process early. For your convenience, I have created an overview of the process. The steps we will take together are:

1. Collect an updated census of your employees and enrolled dependents (template attached).
2. Confirm any medical groups, physicians, and medications that are important to your employees, so we can ensure the smoothest transition. (Template attached.) If you feel more comfortable having employees send this information directly to me, I am more than happy to assist.
3. Schedule a pre-renewal meeting once the information above has been collected; we can then discuss all of your renewal options.
4. Schedule an open enrollment meeting to review any plan updates with employees.

You can also change these steps if yours are different.

I believe if we can accomplish these four items we will be able to avoid a lot of the frustration and delay that go along with having your renewal in the 4th Quarter.

Your best interest is at the heart of everything we do. Remember, our office is here to assist you through this process.

I look forward to our work together to ensure a smooth renewal.

Respectfully,

Your name here