

ITEM: Financial institution email to prospect or client
TOPIC: Promote virtual seminar on Understanding Medicare
USE: For use in all states. Add link for seminar registration. **This email must be from financial institution official's email address. Program disclosure must be added. Email must follow "DO NOT EMAIL" guidelines.**



FROM: [OFFICIAL'S NAME], [FINANCIAL INSTITUTION NAME]
TO: [FINANCIAL INSTITUTION NAME] Customer [CUSTOMER EMAIL]
SUBJECT: Understanding Medicare Virtual Seminar

Planning for retirement is never easy and maneuvering through Medicare rules and regulations is one more step in an already confusing process. Join us for a no-cost, no-obligation virtual seminar that can help answer your questions:

Here's an opportunity to attend a valuable educational virtual seminar on this important topic.

Understanding Medicare
May 5th, 2021 at 6:30pm EST, 5:30 Central

During the virtual seminar, you'll find out more about the basics of Medicare and how financial education can help you in retirement income planning. You'll learn the answers to your Medicare questions and discuss:

- ▶ Medicare basics and the differences between Parts A, B, C and D
- ▶ Tips for choosing your coverage and enrolling in Medicare
- ▶ How to consider health care costs when planning your retirement income

[Reserve your virtual seat.](#)

Space is limited, so I urge you to make your reservations today. Contact your [PROGRAM NAME] representative, [REPRESENTATIVE NAME], at [REP PHONE] or [REP EMAIL] with any questions.

[FINANCIAL INSTITUTION OFFICIAL'S NAME]
[OFFICIAL'S TITLE]
[FINANCIAL INSTITUTION NAME]
[ADDRESS]
[CITY], [STATE] [ZIP]

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[INSERT REGISTERED REPRESENTATIVE DISCLOSURE HERE.]