TURNING 65 SOLUTIONS

Dear Valued Client

It is that time of year again. The Medicare Annual Enrollment Period is October 15th to December 7th for new plans beginning January 1, 20202. If you have a Medicare Advantage plan or a Part D Prescription Drug plan, NOW is the time to start planning for your annual review.

Enclosed, you will find a Medicare Advantage/Part D evaluation form. Please complete the form and return it to me in the stamped envelope I have included. Having this information will allow me to help all of my clients in the short period of time allotted.

You may have provided me with your medical and/or prescription information before, however, due to federal privacy regulations, I DO NOT keep that information on file.

<u>Remember, even if you just turned 65 and signed up for a plan this year, your plan is subject to change for the 2020 plan year and it needs to be re-evaluated.</u>

When I receive the completed form, I will evaluate your current plans. I will then contact you to set up a time for your annual review. If I feel a change of plans is needed, I may ask you to come to the office for a full review. If no changes are necessary, the review can be completed over the telephone.

This is a service I provide to my valued clients at no charge. It is one way that I show my appreciation for your continued business and trust.

I look forward to hearing from you soon.

Sincerely,

Ron Ray

Ronald D. Ray
Owner, Turning 65 Solutions Tax and Insurance

Email List

As my practice has grown over the years, it is becoming less and less feasible to send large batches of traditional mail. Over the past two years, we have been transitioning to email as our primary mode of communication with our clients.

We have been sending an email newsletter for several years now and it has been very well received. It has updates on the company and staff as well as updates on any Medicare or retirements issues. It also provides notifications about upcoming client appreciation events and our very popular educational workshops. These workshops cover important topics such as Required Minimum Distributions, Long Term Care, retirement investing, and Estate Planning.

It will be very important in the future that I have your email address to provide this information in the. If you want to ensure that you do not miss out on these important announcements, please print your email address on the Part D form and we will get you added to the list. I promise not to send more than two emails a week. If you are already receiving our emails, then no action is required.

New Company Brand

In 2016 we create a new investment advisory firm called R&R Wealth Management as the business entity that we use to give financial advice and manage assets. I was not happy with that name and felt that we needed a new brand that fit in better with our company culture and values. The new company name is ***Homestead Family Wealth***. We are a fee-based asset management firm operating under a fiduciary standard. I have enclosed a page that outlines our mission and services.

I am very excited about the future and the services we will be providing to our clients. YOU are our most valued asset and I am so thankful that you continue to allow me to be of service to you as you enjoy your retirement years. Thank you for your continued business and trust.

Best regards,
Ron

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2020 Medicare Advantage and Part D Prescription Drug Plan Evaluation Form

Name:_____________________________ Current Part D Plan:_____________________________

Your preferred email address:____

Please provided information in the table below for Part D Prescription Drug Plans.

Drug Name	Generic Y/N	Dosage	How many per day	Filled Monthly/90 day/other	Preferred pharmacy/ mail order	Comments

Please take the time to tell me about your experience with your plan/s over the past year.

Now, tell me how I have done. I only get better if you tell me what I am doing right, and what I need to improve.

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