"Hi Mr (Client), I'm \_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_\_, just giving you a call to see if you had any questions or concerns about your upcoming Medicare enrollment. We received your name as somebody who will be joining Medicare soon and we would like to help guide you through the Medicare process.”

**They might ask how you got their number** - "...that information is publicly available and your name was on a list of those who might be having some frustration with all of the options available. That's where I can help."

You can double check that they've already set up Part B to start, or, if drawing Social Security already, this is automatic. They'll be very concerned with Part D and answering those questions, so I would have donut hole information for the current year available.