

[Agency Name]
[Agency Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Business Owner Name]
[Company Name]
[Company Address]
[City, State, Zip Code]

Subject: Welcome to [Agency Name] - Small Business Health Benefits

Dear [Business Owner Name],

On behalf of [Agency Name], I would like to officially welcome [Company Name] as a valued client. We are honored to serve as your insurance agency of record and look forward to helping you manage your small business health plan.

Our goal is to ensure that your benefits package remains competitive, compliant, and cost-effective. As your agency, we will provide the following services:

- Annual plan renewals and market comparisons.
- Employee enrollment support and educational materials.
- Assistance with billing or claims escalations.
- Updates on healthcare regulations and compliance requirements.

Your dedicated Account Manager is [Account Manager Name]. They can be reached directly at [Phone Number] or via email at [Email Address] for any questions regarding your coverage or employee changes.

Attached to this letter, you will find a summary of your current plan benefits and a contact sheet for your employees. Please keep these for your records.

Thank you for choosing [Agency Name]. We look forward to a long and successful partnership.

Sincerely,

[Your Name]
[Your Title]
[Agency Name]