

jamesgraz@hotmail.com

From: Linda H...
Sent: Thursday, September 06, 2018 12:52 PM
To: jamesgraz@hotmail.com
Subject: Re: From Jim Grazioli - Our Meeting

Hi Jim,

Thank you for the preplanning information you did for me regarding my Medicare options. Your knowledge and research played a major role in my selection.

In addition your customer friendly personality made me feel more at ease as I was very skeptical deciding what supplement plan was the best for me financially and medically.

I will definitely refer your expertise to others. In fact yesterday I was telling my friends on social media of our Medicare meeting and how you assisted me to make the right choice for me.

May God continue to bless you and your family. I will pull up the information this weekend as right now I have been at the hospital since last night as my mother became ill again.

Thank you again!

Linda

[Sent from Yahoo Mail on Android](#)

On Wed, Sep 5, 2018 at 8:09 AM, James Grazioli
<jamesgraz@hotmail.com.advmailservice.com> wrote:

Hi Linda

Thanks you for meeting with me yesterday and I am happy that I was able to place the proper plans that fit you best.

The prescription plan application did show up in the system so I did not have to use the paper application. I will just keep that as a backup.

I checked on my agent site and your Supplement has already been approved.

I am attaching a copy of your Medicare Supplement Plan F as we talked about. When the Prescription Plan application is available for print, I will send it to you.

Also as I mentioned, I do appreciate any referrals for Medicare or Retirement Planning.

Again thanks very much

Jim Grazioli

James R. Grazioli - President
Comprehensive Financial Group Inc.
Office - 772-286-4324 or Cell/Text - 772-486-1323
Website: www.financialservicepro.com

 Harrison Plan F App.pdf (161K) [Download](#)

jamesgraz@hotmail.com

From: Madelyn P
Sent: Thursday, August 16, 2018 3:22 PM
To: jamesgraz@hotmail.com
Subject: Re: From Jim Grazioli - Enjoyed our meeting

Thank you so much for coming yesterday. I learned so much. I will let Jean know and she will be in touch with you. Yes I will keep in touch because before the 24 months I will want to switch over to the supplement. Thank You
Again, Madekyn

Sent from my iPhone

On Aug 15, 2018, at 8:21 PM, James Grazioli <jamesgraz@hotmail.com> wrote:

Hi Madelyn

I enjoyed our meeting today and I wanted to let you know your Humana PPO application has been submitted.

I will keep in touch with you.

Please email me back and let me know when you complete the call to Guarantee Trust Life (Hospital Plan Company).

Also please let me know if you have any questions.

It was also nice meeting Jean today, and I will help her with anything she needs.

Sincerely

Jim Grazioli

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Website: www.financialservicepro.com

jamesgraz@hotmail.com

From: Judi A.
Sent: Friday, May 18, 2018 7:42 AM
To: James Grazioli
Subject: Re: From Jim Grazioli -

Morning Jim,
Thank you for getting back so quick.

Let's come up a phone call on Monday?

Thank you,
Judi A

On May 17, 2018, at 6:04 PM, James Grazioli <jamesgraz@hotmail.com> wrote:

Hi Judy
I use to provide the Mutual of Omaha Medicare plans years ago but not since I have been providing United Health Care.
I was able to get the quote tonight for the Mutual of Omaha for Plan G and F.
Plan G Mutual of Omaha is \$193.51 and United Health Care is \$198.70.
Plan F Mutual of Omaha is \$212.31 and United Health Care is \$214.74. These are tobacco rates.
The reason I personally have United Health Care and not Mutual of Omaha is because the rate increases with United Health Care have been very minimal through the years. Also they are the only company that allows you to change to another supplement plan without underwriting and health questions. Example, if you start with plan G and you wanted to switch to Plan F, you can do that.
Also they are the only company that if you start with a Medicare Advantage plan, they will not ask any health questions and allow you to switch at the right times to a Supplement plan for 24 months after you turn 65.
I can provide either for you depending on what you like.
Let me know if you have any questions.

Thanks so much

Jim Grazioli

From: Judi
Sent: Thursday, May 17, 2018 3:10 PM
To: jamesgraz@hotmail.com
Subject: Re: From Jim Grazioli -

Thank you Jim!

Can you work the numbers for:
Mutual of Omaha, Group G

Thank you,

Judi

jamesgraz@hotmail.com

From: Lenny <lenny_gn@>
Sent: Monday, November 19, 2018 3:45 PM
To: jamesgraz@hotmail.com
Subject: Re: From Jim Grazioli - Summary of Benefits

Thanks Jim you are a true professional.

Sent from my iPad

On Nov 19, 2018, at 12:42 PM, James Grazioli <jamesgraz@hotmail.com.advmailservice.com> wrote:

Hi Lenny

Attached are the Summary of Benefits for your AARP PPO plan.

I will bring you a booklet as soon as I receive them.


Thanks so much and let me know if you have any questions.

Also they will be calling you to verify your plan you have chosen.

Sincerely

Jim Grazioli

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 AARP PPO.pdf (96K) [Download](#)