

Advisor Program Membership Announcement Templates

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Read First

- Your firm is only a Member if all advisors are Health Rosetta Advisors, otherwise please ensure clarity that this is an individual Membership.
- These are templates, intended to be starting points from which you can add personalized details about you, your client focus and your work.
- At a minimum, make sure you update all highlighted portions.

Ideas for How to Customize the Letters

- **For your practice:** do you specialize in a certain area that you can highlight? do you have a relevant case study you can reference?
 - Example: Last year, we worked with a Denver-area manufacturer with 320 covered lives to implement reference-based pricing, saving them 10% YoY on their healthcare spend.
- **For your geography:** if your focus is a metro region or state, highlight that and your work in the community.
 - Example: We've been working with employers in the Tampa area for over 20 years, are active members of the Greater Tampa Chamber of Commerce with dozens of satisfied clients who are able to re-invest their healthcare savings into moving their businesses forward.
- **For the client/partner:** the more personal and custom the letter, the more likely it is to be read and responded to. You can use previous conversations or even recent news about the organization to

highlight which changes may make sense for them and why making changes now is particularly relevant.

- Example: With your upcoming merger with the ABC company, navigating differences in healthcare and other benefits can be particularly tricky. Now is a perfect time to explore proven methods from other companies that have reduced costs and improved benefits.

Membership Announcement: Press Release

Date: Month Day, Year

Headline: **YourName** Becomes First Health Rosetta Advisor in **YourState**

Headline: **YourName** Joins Elite Health Benefits Transparency Membership

Headline: **YourName** Chosen as Member of Transformative Healthcare Program

Subhead: **YourName** joins an elite group of Benefit Advisors around the country dedicated to fixing healthcare

Subhead: **YourName** and Health Rosetta bring **YourState** CFOs new choice to lower healthcare costs

Subhead: **YourName** Becomes Certified to Chart New Course for Employer Health Benefits

YourName has been accepted to join the rigorous Health Rosetta Benefit Advisor program. This distinction sets **him/her** apart as a truly innovative advisor, one committed to reshape healthcare's status quo while improving their client organizations' financial future and their employee's productivity.

Dave Chase, founder of Health Rosetta, had this to say about this notable class of advisors: "Forward-leaning benefits experts are the vanguard that are worth their weight in gold. They've left behind wasteful, obsolete approaches that plague most employers. They're the architects and early members of the Health Rosetta. I can't thank them enough. They take what Margaret Mead once said to heart: 'Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it's the only thing that ever has.'"

YourName is one of only about 200 such Health Rosetta Advisors that exist across the country today. "It is a rare honor," **s/he** says, "and a wonderful feeling to be recognized as we work to re-shape the industry. Our mission has always been to do away with the waste that has traditionally left employers spending more each year on health insurance and getting less in benefits. This membership is a good sign that we're making tremendous strides in that journey."

As a member of the Health Rosetta program, our clients will gain access to an even broader array of techniques that have helped all types of organizations reduce their healthcare spending by 20% or more. We look forward to working with more **YourState** companies to implement **reference based pricing, transparent pharmacy benefits, direct primary care**, and other transformative practices. These techniques and more are covered in Dave Chase's books, [complimentary download here](#).

Dave explores the already-existing solutions to the largest public health crisis in a 100 years, drawing heavily on the content and themes from his 2017 best seller, *The CEO's Guide to Restoring the American Dream*. It uncovers the upstream, systemic fixes designed to stop the crisis at its source.

About YourName

Your brief bio.

About Health Rosetta

Health Rosetta provides the blueprint for high-performance health benefits sourced from the real life experience of public & private employers and unions across the country. They're working to build an ecosystem that taking the best practices being implemented across the country and uses them to scale healthcare's fixes.

Contact: youemail | yourphonenumber

Membership Announcement: Letter to current clients

Dear TheirName,

Bottom Line Improvement Opportunities for 2026

I am honored and excited to let you know that I was selected as one of only ~200 Benefits Advisors in the country to be accepted to the Health Rosetta Advisor Program, in recognition for our work to better manage our clients' health benefit spend. This membership provides me access to experts, solutions, and strategies other companies have used to more effectively manage their health benefits quality and cost. Let's find a time when I can share these with you.

A component of the Health Rosetta Advisor Program is to work with you on a strategic 2-3 year plan for your health benefits. This strategic plan will complement and support your enterprise goals and your human capital management strategies. I look forward to exploring which of the Health Rosetta components make sense for your organization, allowing us to continue reducing your spend and improving your employees' health.

I'd also like to give you a copy of a book based on these approaches, [*The CEO's Guide to Restoring the American Dream - How to Deliver World Class Health Care to Your Employees at Half the Cost*](#), that provides an inside look at how public and private employers and unions across the U.S. are reducing their spending by 20% or more by applying simple, practical, and proven approaches.

I look forward to our continued work together to deliver better benefits at lower costs. I'll be in touch to schedule time to discuss this.

Best,

YourName

Contact: [youremail](#) | [yourphonenumber](#)

Membership Announcement: Letter to potential clients

Dear [TheirName](#),

How to achieve lower healthcare costs with better benefits for your employees

Are you tired of the annual negotiations about how much your healthcare costs will increase? I am working with other employers to implement proven practices that reduce healthcare expenses, in some cases by as much as 40% and then keep them flat. Let's talk about how to get [TheirCompany](#) on this path.

I was recently selected as one of only ~200 Benefits Advisors in the country to be accepted to the Health Rosetta Advisor Program, as recognition for the groundbreaking work we've done to better manage our clients' health benefit spend. In addition, this membership provides me access to experts in methods other companies are using to more aggressively manage their health benefits.

One of these methods is a multi-year strategic health benefits plan, which charts the course to increased efficiencies and which complements and supports your enterprise goals and human capital management strategies. If you don't have one yet, let's talk about getting one in place.

I'd also like to share with you a book, [The CEO's Guide to Restoring the American Dream - How to Deliver World Class Health Care to Your Employees at Half the Cost](#), that provides an inside look at how public and private employers and unions across the U.S. are reducing their spending by 20% or more by applying simple, practical, and proven approaches.

I look forward to our working together to deliver better benefits at lower costs. Please let me know when would be a good time to talk: [youremail](#) | [yourphonenumber](#)

Best,
[YourName](#)

Membership Announcement: Letter to referral sources

Dear [TheirName](#),

Bottom Line Improvement Opportunities for 2026

I am honored and excited to let you know that I was selected as one only ~200 Benefits Advisors in the country to be accepted to the Health Rosetta Advisor Program, as recognition for the groundbreaking work we've done to better manage our clients' health benefit spend. The even better news is that this membership provides me access to experts in methods other companies have used to more aggressively manage their health benefits. Let's find a time when I can share these with you.

I appreciate your ongoing partnership and collaboration on behalf of our mutual clients. You know my commitment to ensuring my clients have access to the most extensive and innovative options to manage their healthcare spend. This membership has rapidly extended the knowledge and resources I can bring to my clients. I look forward to telling you more about it.

I'd also like to share a book with you, [*The CEO's Guide to Restoring the American Dream - How to Deliver World Class Health Care to Your Employees at Half the Cost*](#), that provides an inside look at how public and private employers and unions across the U.S. are reducing their spending by 20% or more by applying simple, practical, and proven approaches.

I look forward to our continued work together to deliver our clients better benefits at lower costs. I'll be in touch with **AdminName** to schedule time to discuss this.

Best,
YourName

Contact: **youremail** | **yourphonenumber**

Social Media

LinkedIn post

I'm pleased to announce that I have earned the distinguished recognition as a Health Rosetta Associate Advisor, as recognition for the groundbreaking work to better manage clients' health benefit spend. The Advisor Program also provides access to more techniques and resources that employers across the country are using to save 20% or more on their healthcare benefits. Drop me a line if you'd like to learn more.

LinkToPressRelease

Tweets

Great recognition of the work we do to save our clients 20% or more and improve their health benefits. Drop me a line to learn more. **LinkToPressRelease**

Huge honor to be a Health Rosetta Associate Advisor + gives me more tools to save my clients 20% or more. Ask me for more info. **LinkToPressRelease**



Want a free copy of a groundbreaking book about saving 20-40% on your healthcare costs? Let's talk.

[LinkToPressRelease](#)