

Are You Considering Starting An Employee Retirement Program?

[Date]

[Contact Name]
[Company]
[Address]
[City], [State] [Zip]

Dear [Mr. /Ms. Last Name]:

If you, or someone in your organization, is looking to start an employee retirement program - or even thinking about it, we would like to assist you in making the "best" decision for your company. If you are like most business owners, trying to compare one retirement package from another is a laborious and difficult process. Many turn to their CPA or business associates for a "recommendation".

Before you meet with any retirement plan provider, ask these three important questions:

#1: How long will you guarantee my administrative fees? - The administrator of your retirement plan makes their money on fees. It is important to know how long a quoted fee will stay the same. After getting set-up in a plan, you don't want to find out after a year that the administrator will be raising your fees.

#2: Everyone promises great customer service, but can you provide me with some type of Service Satisfaction Guarantee—in writing? - Any retirement plan provider or company can say they have great customer service. Ask them to back it up with a guarantee that credits back fees should they fail to deliver on their promises.

#3: How will you support me and my employees should they have any questions? – Make sure your retirement plan provider offers a dedicated single point-of-contact for you and your financial professional and a trained team of specialists for your employees.

At _____, we know you're running a business, not trying to figure out how an employee retirement plan works. That's why we've committed ourselves to educating you on how to select the most optimum retirement plan.

Please call or fax us today to schedule your free *Retirement Plan Analysis* study. The study will show you how a comprehensive retirement plan can benefit your organization.

Continued Success,

Name/title



FREE Retirement Plan Analysis Study

We are offering your business a **FREE Retirement Plan Analysis Study** so you can see first hand the cost savings you'll experience with a customized program. To receive your free study, fill out the information on the back of this letter and fax to the number below.

Fax to: (XXX) XXX-XXXX

For Faster Service Call: (xxx) xxx-xxxx

**Your Company's Name
Address, City State Zip
Telephone Number**

Company Name: _____

Nature of Business: _____

Contact Person: _____ Title: _____

Address: _____

Phone #: _____ FAX # _____

Best time to call _____

E-Mail Address: _____

Please Deliver FAX to:

**Your Name
Fax Number**