

33% Of All Business Owners Are Frustrated With Their Retirement Plan Provider?

[Date]

[Contact Name]
[Company]
[Address]
[City], [State] [ZIP code]

RE: Upgrading Your Retirement Plan Provider Just Got Easier

Dear [Mr./Ms.Name]:

That's right! A recent survey indicated 33% of all business owners who have an employee retirement program are frustrated with their provider because of poor customer service. At _____, we pride ourselves with providing our clients with industry leading customer service solutions.

The Moment You Talk With Us, You'll Realize How Committed We Are To Both You And Your Employees.

(Your company name) takes its customer service commitment to a level well beyond the typical financial advisor. In fact, out of the hundreds in the area you can select, we're one of the few, if not the only one, who gives you a three-part service commitment. They are:

- #1: Your Phone Calls Are Immediately Returned: Whenever you call us, we'll make sure we get back to you immediately.
- #2: We Follow-up With Your Employees: Our goal is to have your employees be an active part of your retirement plan. This includes providing annual enrollment meetings and education materials.
- #3: Problems Get Resolved In A Timely Manner: Sure, issues and questions always come up in a relationship, but they don't have to be "problems". That's why our proactive customer service team gets to the root cause before it becomes an issue.

At _____, we know you're running a business, not trying to figure out how an employee retirement plan works. Please call _____ or fax us at the number below to schedule your free Retirement Plan Analysis study. The study will show ways to maximize the benefits in your plan.

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 potential cost savings, investment options and our customer service commitment. To receive your free study, fill out the back of this letter and fax it to the number below today.

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