

We'll Give You And Your Employees A Retirement Package Everyone Will Brag About!

[Date]

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

Dear [Mr./Ms. Last Name]:

As retirement plan administrators are integrating so called "technology" in their business, many owners and their employees are complaining about.....Not getting enough personal attention from their retirement plan's financial representative.

If You Answer "I Don't Know" To Any Of These 5 Questions, You Need To Consider A New Retirement Plan Solution.

1. When was your plan's last checkup?
2. Is your investment lineup still appropriate?
3. Is the cost of your plan competitive or are you paying too much?
4. Are you compliant with your fiduciary responsibilities?
5. Does your plan's record-keeper provide you with timely and accurate services/statements?

Our retirement plan clients don't have that problem.

At (company name) our goal is to make *your* plan successful, not only today, but for many years to come. We'll design your plan to fit your needs AND be easy for your employees to use. You can count on us to:

- Recommend the right service and investment options that benefit both you and your employees.
- Educate your employees so they can make solid, informed retirement planning decisions.
- Provide excellent service when you need us.

We would be pleased to start with a free in-depth review of your retirement program. I will be calling you in the next 3 – 4 days to arrange a convenient time to meet with you.

Sincerely,

(Your Name)

P.S. Your FREE Retirement Plan Review is an excellent way to determine your Fiduciary liability.