

Who's Monitoring Your Company's Retirement Plan Investments?

[Date]

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

Re: Don't Let Your Company's Retirement Plan Run On Autopilot

Dear [Mr./Ms. Last Name]:

As a business owner, you don't let your business run on autopilot, and no one should expect their retirement plan investments to monitor themselves either. If you're like most people today, you don't have time to take your car in for a tune-up or schedule an annual physical for yourself, let alone make an appointment for a financial check-up.

The Investment Climate Has Changed Dramatically Over The Past Year.

These changes in the market place may have had an impact on your original goals as well. Here at (firm's name) we are keeping up with the changing times and communicating the latest news and industry trends to our clients.

We offer a wide array of investment products and services that can help you achieve your investment goals. The best way for us to help you is to reevaluate or establish such goals is with a free financial check-up.

Two Key Reasons Why Other Business Owners Get A Second Opinion On Their Retirement Plan?

Reason one: to reduce their out-of-pocket expense; Reason two: limit their liability. We can discuss and review your investment objectives and goals. We'll help make the financial planning easier.

Remember that I am available for consultation at your convenience. Please call me at (phone number) to set up an appointment or drop by the office on (Day (s) of the Week).

Sincerely,

(Name of Financial Advisor)
(Name of Firm)



FREE Retirement Plan Analysis Study

We are offering your business a **FREE Retirement Plan Analysis Study** so you can see first hand any potential cost savings, investment options and our customer service commitment. To receive your free study, fill out the back of this letter and fax to the number below today.

Fax to: (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**