

Retirement Planning  
Distribution Planning

Date

Mr. & Mrs. Prospect  
Address  
City, State Zip

Dear Mr. & Mrs. Prospect,

May I take a moment to ask you to consider three questions?

- Are your retirement assets being professionally managed by a reputable company?
- Have they been properly invested for safety and income by an advisor you trust?
- Have you taken steps to help ensure that you won't become a burden to your family?

These can be tough questions to answer. But for individuals who want to maintain a certain amount of control over their lives *and* enjoy a comfortable retirement, they are questions that must be answered. Of equal importance are the answers to such questions as:

- How can we ensure that we won't outlive our assets?
- How can we prevent the financial losses, which would likely be caused by a long-term illness or injury?
- How can we leave our assets to our heirs instead of the government?

If you are uncertain of, or uncomfortable with, any of your answers to the above questions, I'd like to help. I've been helping retirees and those about to retire address these issues for over [number of] years. It may be that some of the solutions that have helped my other clients would be of benefit to you.

Toward that end, I'll plan on calling you in the next few days to determine your interest in setting up a meeting to discuss any questions or concerns you have regarding your retirement and estate planning. There is no fee for the consultation, and no obligation of any kind on your part.

Sincerely,

Name

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