

Date

Name

Address

City, State, Zip

Dear []

Effective retirement planning is among the most critical issues facing Americans today! Are you confident that you'll enjoy a secure and comfortable retirement?

Over the past two years, the rules concerning Qualified Retirement Plans have changed, making them more attractive and lucrative to Business Owners. As a result, innovative and significant planning opportunities have evolved, including the ability of employers to make considerably higher tax-deferred contributions.

Many business owners have not updated their plan designs to take full advantage of these changes, and so are not enjoying all the benefits allowed under current tax law.

Are you among those business owners? If so, why not let a retirement specialist help you get the most out of your plan? At (insert DBA Name, or field office name), we offer a complementary plan analysis designed to ensure your plan is as up to date as possible. We will also use that time to answer any questions you may have about your plan, tax law, or other concerns.

I will be contacting you shortly to arrange a mutually convenient time to discuss the benefits of this exciting planning opportunity. If you have questions in the meantime, please don't hesitate to give me a call!

Sincerely,