



Dear Valued Client:

I've had the pleasure of working with you regarding your insurance/financial needs in the past. To ensure that your thoughts and retirement plans are being put into action, and working as effectively as you would like, I would like you to consider:

A SAFE PLAN FOR RETIREMENT IN 5 EASY QUESTIONS!

- 1) What are the 2 most important issues to you regarding your retirement savings?
- 2) Do you think you could truly withstand the next bear market?
- 3) Will you have the income stream that you'll need?
- 4) Are you prepared for nursing home or home health care in the event you, or your spouse, need it?
- 5) Do you have in place the following: power of attorney, healthcare directive, a will, a Trust if applicable?

I will be giving you a call in the next week to review these critical questions with you. My commitment to you is to answer any questions you may have, and to put a thorough plan in place for you!

I look forward to speaking with you soon.

Sincerely,

YOUR ADVISOR