

The New Rules of Retirement Saving: Client Letter

Sharing the Book

- Letter can be used to prospect within your current book of business, as part of an effort to increase wallet-share from your clients
- Letter can accompany a copy of *The New Rules of Retirement Saving* book.
 - As a StonewoodFinancial.com member, you can order wholesale copies of this book or have the book customized for your practice. For more information, visit <https://pages.stonewoodfinancial.com/book-downloads>.

Please note: This letter is a sample draft only. Ensure this letter meets your required compliance standards.

Dear [Current Annuity Client Name],

I've been honored to help you prepare for your future. Now, I'm inviting you to break some rules.

Here's what I've found: Too many smart, well-intentioned people are saving for the future using outdated rules. And our firm is on a mission to change that.

I've enclosed *The New Rules of Retirement Saving*, a powerful book that sheds light on the myths Americans save under... and what new rules you should follow instead.

Clients tell me it was the single most eye-opening read of the past year – and I've seen them make positive changes because of it.

I'm recommending you take two simple actions:

#1: Block off an hour of time this week to read the book.

#2: When you're finished, pass it along to a family member or friend who would benefit from the knowledge as well.

If you want to make sure you're saving under the New Rules, give my office a call at (---) 000-0000 and let's set up some time to talk.

Sincerely,
[Signature and Name]

P.S. – In case you're wondering, *The New Rules* is an easy read – no insider jargon, just straight talk on issues that matter. I know you'll enjoy it.

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