

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

It was a pleasure meeting with you on [Date of Consultation] to discuss your retirement goals and strategies for protecting your hard-earned assets. I appreciate the opportunity to learn more about your financial objectives and your vision for a secure retirement.

During our meeting, we focused on how an annuity can serve as a cornerstone for your retirement asset protection plan. Based on our conversation, here are the key benefits we identified for your specific situation:

- **Principal Protection:** Safeguarding your initial investment from market volatility.
- **Guaranteed Income:** Establishing a reliable income stream that you cannot outlive.
- **Tax-Deferred Growth:** Allowing your interest to accumulate without immediate taxation.
- **Legacy Planning:** Ensuring efficient transfer of remaining assets to your beneficiaries.

I have enclosed the personalized illustrations and brochures we discussed. These documents provide a detailed breakdown of the projected growth and protection features of the [Specific Annuity Product Name] we reviewed.

Please take some time to review these materials. I will follow up with you on [Day of Week] at [Time] to answer any questions you may have and to discuss the next steps in securing your financial future.

If you need immediate assistance or would like to move forward sooner, please feel free to contact me directly at [Phone Number] or [Email Address].

Thank you again for your trust. I look forward to helping you achieve a worry-free retirement.

Sincerely,

[Your Name]

[Your Title]

[Company Name]