

Dear [Client Name],

It has been a pleasure working with you to secure your retirement income through your annuity. My primary goal has always been to ensure your financial peace of mind and the long-term protection of your assets.

As we have discussed, many families today are concerned about market volatility and the challenge of creating a lasting legacy. Because of the success we have had with your portfolio, I am reaching out to see if you have family members or close friends who could benefit from the same level of protection and wealth planning.

If you feel that someone in your circle is looking for strategies to guarantee income or protect their family's financial future, I would be honored to provide them with a complimentary consultation. I promise to treat them with the same care and professionalism that I provide to you.

You can simply introduce us via email or provide them with my contact information below. I have also enclosed a few of my business cards for your convenience.

Thank you for your continued trust and for allowing me to serve your family.

Best regards,

[Your Name]

[Your Company Name]

[Phone Number]

[Email Address]