**Must be on approved producer and/or broker dealer letterhead.**

Current Date

Client Name

Company Name

Street Addrress

City, State/Province Zip Code

[ST] Insurance License Number [123456789]

Dear (Client/Prospect):

**The transfer of your business ownership and the impact on a successful retirement may be a challenge I can help navigate.**

As a business owner, you worked hard to build your business. It may represent the largest and most important asset you own. Now you are looking forward to retirement and the transfer of your business interest.

Establishing an exit strategy is one of the most important issues facing business owners. Whether you want to sell your business or transfer it to family members, the key to a successful exit strategy is the coordination of your personal retirement and estate needs with your business succession strategy. A properly established exit strategy will protect you, your family, and your business associates.

Careful planning and teamwork are the critical factors for any successful business transition. An effective business transition strategy can help reduce your taxes.

There are many tools and techniques that use insurance and financial products that are available in the successful transfer of your business.

I would like the opportunity to discuss how these tools and strategies can help you. While I do not provide tax or legal advice, I will work with your advisors to develop a plan for your future financial security. I will call in a few days to arrange a meeting at your convenience.

Sincerely,

Financial Service Professional Name, Title

This material is being provided for informational or educational purposes only and does not take into account the investment objectives or financial situation of any client or prospective clients. The information is not intended as investment advice and is not a recommendation about managing or investing your retirement savings. If you would like information about your particular investment needs, please contact a financial professional.

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