A helpful guide for remarketing conversations

Email script for clients currently in a retirement plan

\*Be sure to attach the brochure “It’s time to upgrade your retirement plan”

**Subject line:** Enhance Your Retirement Benefits with a Modern Solution

Hi {client name}​,

As the cost of living continues to rise, employers are prioritizing retention and financial wellness for their employees. Upgrading your current retirement benefits plan could have a significant impact on employee satisfaction and the time you need to spend on plan administration.

I would like to introduce you to Common Wealth, a modern retirement benefits provider that I’ve had great success with. They offer lower fees than traditional plan and I’ve been impressed with their digital administration and responsive support for both employers and members.

With Common Wealth, you’d have access to modern technology and members could earn more. The transition process is simple and seamless, making it a worthwhile consideration for your team.

I have attached a brochure that provides more information about Common Wealth.

I’d be happy to set up a call to review how upgrading your retirement plan can benefit both your employees and your business.

Please let me know if there is a convenient time for us to connect.

Best regards,

[Advisor Name]