HOW IT'S DONE

General Prospecting Letter

Date

NAME
Address
City, State, Zipcode

Dear _____:

As a parent, spouse, and business person, we all have many roles and obligations in life. Keeping the promises we have made to ourselves, our families and those around us is no easy task. There are many things in life that we just never get around to completing. For example, on the enclosed page you will find a list of items that should be stored in a fireproof/water safe place in case of an emergency. As simple as this task is, most people haven't taken the time to get it done.

Hi there, my name is _____ and I am a financial advisor with _____. (Your Firm). Your__ (policy/product) __ currently is not assigned to anyone for service and I would like the opportunity to meet you and visit with you about it. I would like to learn about you, your dreams and your goals. Like most of us, I am sure that there are many things that you have accomplished; things that you have in process and things that you still want to do. As far as a sales pitch there is none, if I can be of help in any way, I will consider it a privilege to do so.

I would also like to offer you an opportunity to develop a plan that not only addresses your financial picture, but also the other things that are happening in your life. It will include a review of your goals and objectives, your financial picture and property insurance. The plan will also take into account your other assets, liabilities, cash flow, investments, retirement planning, estate planning, tax planning and insurance needs, as well as timelines for implementation.

If you do not currently have a financial advisor, I would like to take on that role with you. If you already have a financial advisor, perhaps you would like to have a second opinion. I would be happy to evaluate your situation and give you my opinion.

In the next few days, I will give you a call to get together and discuss how I may be able to serve you.

Sincerely,

(Advisor)