

RGL Group Updated Client Introduction Letter Rev1
M. Gavel-Briggs

Dear <Name>

At RGL Group Financial, we understand the importance of having a trusted team of financial professionals in your corner to protect and grow your valuable assets. We appreciate your trust and business as we continue to work hard on your behalf.

In today's uncertain economy, we know that most financial products and services are offered separately without the big picture in mind. That is why we have come to provide comprehensive planning that covers solutions for all of your business and personal needs, without gap or overlap in your coverage. Because of our working history together, we understand your business and personal needs in depth to offer you total planning solutions to ultimately protect and grow your assets to the next level.

More services to better serve your needs

We have recently expanded our products menu to include property and casualty insurance protection to greater enhance both your business and personal property security.

For years we have been helping numerous business owners by providing wide-range financial planning, including **risk management, tax-saving strategies, employee and executive benefits plans**. We're now offering **workers compensation** and **commercial auto, property and liability insurances** for a total planning solution that includes a review of your current policies to make sure there is no gap or overlap in current coverage. Understanding the value of the right amount of coverage is crucial to avoiding liability loss.

For individuals, our personal planning offerings have included **investment strategies** and **insurance, retirement, estate and charity planning**. Now you can add **auto** and **homeowner's insurance** to those services for greater protection of all of your personal property in a one-stop planning source.

RGL Group Financial thrives on understanding your unique personal and business needs. We have strong relationships with over 200 insurance carriers in order to compare coverage and premiums so that you receive the best coverage for the best premium cost possible.

Call us today to see how RGL GROUP FINANCIAL can help you improve your current protection coverage. We'll be in touch with you before your next renewal so you do not miss out on this valuable opportunity.

Sincerely,

Aleks Dyo
President, CEO
RGL Group Insurance and Financial Services Inc.

Kelly Woo
Partner
RGL Group Insurance and Financial Services Inc.