

RGL Group – Pension Admin Letter Draft
M. Gavel-Briggs

Dear <Name>

In uncertain times it makes good sense—and good business—to maximize your company's investment policies and options. With looming budget cuts, employee displacement and compromised revenue streams, revisiting your current pension account to improve choices and enhance performance is one solid way to maintain equilibrium in stormy economic seas.

Regardless to whether implementing changes may be in order or maintaining your current plan seems the best course of action, the RGL Group can help. With professional guidance and a customized, no obligation (confirm) review of your present retirement plan and investment strategy, the RGL Group offers an objective opportunity to learn the latest in plan services, legislation, tools and techniques to achieve growth for you and your employee's hard-earned retirement assets.

Consider these game-changing investment factors when it comes to whether your current pension plan is up to today's standards:

- The inclusion of significant changes for qualified and non-qualified plans in the Pension Protection Act of 2006
- Valuable time and money-saving plan packages that include integrated design, documents, funding, benefit protection and administration/reporting
- Tax-advantaged informal plan funding through COLI for the owner, top execs and other key employees

The RGL Group specializes in retirement planning, risk management, asset protection, wealth strategies and business and estate planning. Our experienced financial representatives thrive on translating today's often complex and technical investment speak into simple, common sense language so you can choose the best path for your company.

If you are already *completely satisfied* with your current plan and administrator we'll be the first to recommend no changes be made. If you are not entirely confident in your present day plan we'll make recommendations and provide a roadmap for making the most of your company's situation and resources.

Call us today to see how your plan stacks up—you have everything to gain.

Sincerely,

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

Kelly Woo
Partner
RGL Group Insurance and Financial Services Inc.