

ITEM: Rep email to prospect or client
TOPIC: Promote virtual seminar on Three Transitions to Retirement
USE: For use in all states. **This email must be from rep's email address and already includes the program disclosure. Email must follow "DO NOT EMAIL" guidelines.**



FROM: [REP NAME], [PROGRAM NAME] Representative
TO: [FINANCIAL INSTITUTION NAME] Customer [CUSTOMER EMAIL]
SUBJECT: Find out if you're really ready to retire.

Are you ready to retire? You might be prepared for the financial transition, but you'll experience lifestyle and emotional transitions as well. We can help you understand these upcoming changes and provide the information you need to better prepare for this exciting season of your life. Working together, we'll gain clarity and confidence about your path to retirement.

Here's an opportunity to attend a valuable virtual seminar on this topic.

Three Transitions to Retirement: *It's about more than just the money*
June 2nd at 6PM Eastern

During this session, you'll learn:

- How to confidently address the financial, lifestyle and emotional transitions to retirement
- How to guard against risks and manage those that are inevitable
- Whether you are ready for retirement

[Reserve your virtual seat.](#) (Link to WebEx registration)

Space is limited, so I urge you to make your reservations today. And give me a call at [REP PHONE] with any questions about the virtual seminar or contact me by email at [REP EMAIL]. I look forward to seeing you virtually.

[REP NAME]
[REP TITLE]
[PROGRAM NAME]
Located at: [FINANCIAL INSTITUTION NAME]
[ADDRESS]
[CITY], [STATE] [ZIP]
Phone: [REP PHONE]
Email: [REP EMAIL]

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[INSERT REGISTERED REPRESENTATIVE DISCLOSURE HERE.]