

PROSPECT LETTER

Designed for the LEGACY BUILDER

Dear [Clients First Name],

One of the best things about life insurance is the way that it allows you to provide something special when you pass on – a legacy.

Building a financial legacy can be an immense gift indeed to pass along to your family or favourite cause – and yet it is so much simpler to attain than most people realize. The key is to utilize the strengths of permanent life insurance to cover those assets and investments accumulated for the next generation.

The best part is we can personalize this strategy to meet your needs for today, tomorrow and for years to come, all with the benefits of passing along your financial legacy to those you care most, tax-free and very affordable.

Please take the time to read the enclosed information on how to make a difference with those you care most about most. I will follow up shortly to answer any questions you may have and talk about how we can start building your legacy.

Sincerely,

[ADVISOR NAME]
[TITLE & CONTACT INFO]