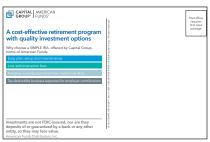
## Retirement plan services for SIMPLE IRA plans

SIMPLE IRA prospecting postcard write-in messages



# Offering a retirement plan can be SIMPLE





To personalize a postcard, you may want to write in an appropriate message from this list. These messages have already been FINRA-reviewed for your convenience.

### 1. Choose a write-in message

#### State-specific messages

Some states require, or are considering requiring, employers to join a state-sponsored retirement program if they don't already offer a plan. A SIMPLE IRA could offer a low-cost alternative that can be tailored to a company's needs.

You can select the appropriate message below for clients in states with state-sponsored retirement programs. For the status of each state, visit capitalgroup.com/advisor/state-plans.html.

States that have begun implementing mandatory programs:

• A SIMPLE IRA may be a good alternative to [STATE's] state-run IRA program. Let's chat and discuss deadlines.

States that have passed legislation but not yet implemented mandatory programs:

• [STATE] plans to require certain employers to offer a retirement program. Let's discuss how a SIMPLE IRA could fit the bill.

States that have, or plan to have, a voluntary statesponsored retirement program:

 A SIMPLE IRA may be a good alternative to [STATE's] state-sponsored program for you and your employees.

#### **Generic messages**

The following generic messages work for clients in any state:

- Let's talk soon about how adding a SIMPLE IRA to your benefits program can help attract and retain employees.
- Both you and your employees can make tax-deferred contributions.
- Enjoy greater tax advantages than a traditional IRA while you and your employees prepare for retirement.

## 2. Have a follow-up plan

Choose either of the write-in sign-offs below, depending on whether your client's state law prohibits phone solicitations:

- I will call you soon to answer your questions.
- Please call me for details at (add your phone number).

Postcards turn what would have been a cold call into a warm contact.

### 3. Turn a stamp into a success

Financial professionals have reported success with our postcards. Here are some tips for using them effectively:

- Target your audience. Ensure the card is a good fit for your mailing list is it better for selling to prospects or for cross-selling to existing clients?
- Mail once a week. Send a small enough batch so you'll be able to phone each recipient within five business days.
- Personalize the cards to make them more inviting:
  - Sign the cards by hand.
  - Use postage stamps instead of postage-meter labels.

## 4. Order postcards

Order online at capitalgroup.com/advisor in the Forms & Literature section, or call (800) 421-9900.