{Name}{required}, {Designations}* {optional}
{Approved Title}, {Prudential Advisors}
{optional Insurance License #1}
{optional Insurance License #2}
{Division or Territory}

{Company Name}
{Address}
{City}, {State} {Zip Code}
{Phone Number} {Fax Number}
{Email Address}

Dear {Recipient Name},

There are many generalized savings guidelines published in articles about retirement planning. Some examples include saving 15% to 25% of your gross income annually, saving multiples of your income by retirement, and more. But unwritten goals are just wishes.

That's why my clients have personalized savings benchmarks to help avoid shortages later in life. Meeting those benchmarks requires a professionally planned portfolio that accommodates their financial circumstances, needs, risk tolerance, and timeline. Together, we check progress annually to help ensure their portfolio is set to stay on track.

Of course,
I am here to help!

Working together—with your tax advisor—you'll understand every tax and financial opportunity available to you. Just call to schedule a time that's convenient for us to meet.

Sincerely,

{Name Signature}
{NAME} {REQUIRED}, {DESIGNATIONS}* {OPTIONAL}
{Approved Title}, {Prudential Advisors}

[Disclaimer]

Control #