

## Retirement plan services for SIMPLE IRA plans

SIMPLE IRA prospecting postcard  
write-in messages



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# 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](https://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 state-sponsored 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.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

## 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](https://capitalgroup.com/advisor) in the Forms & Literature section, or call **(800) 421-9900**.

**For financial professionals, third-party administrators and consultants only.**

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