

Date

Client/guest name

Address

City, Province

Postal code

Dear <insert client/guest name>

Thank you for taking the time to attend our seminar *From asset allocation to product allocation – the new paradigm in retirement planning*. We hope you found the presentation insightful and thought provoking.

The purpose of the seminar was to demonstrate how product allocation can help ensure that your retirement income plan can protect you from the unique risks that investors face during their retirement years.

By adopting a product allocation strategy for your retirement, you can gain:

- More confidence and certainty that your retirement income will last a lifetime
- The optimal mix of investments offering you growth and income guarantees
- The ability to maximize income potential while minimizing financial risks

I will be contacting you by <insert date here> to schedule a time where we can get together and discuss how product allocation can fit into your retirement income plan.

Once again, thank you for attending the seminar and I look forward to speaking with you in the near future.

Sincerely,

Advisor name, credentials