

Pre-Approach Letter for General Audience without Buy-Sell Agreement (Customize this letter for those without a funded buy-sell agreement)

[Print on your letterhead]

Date

Name

Address

City, State, Zip

Dear (Name)

You and your partner have worked hard to make your business what it is. Where would it be if your partner became sick or injured? If one of you were unable to work due to a total disability, do you have an agreement in place to protect your business? If the unforeseeable happened, could your business survive?

That's where I come in – working with you to put in place a disability buy-sell policy that helps protect the business in the event of disability. A solid, well thought-out plan can provide peace of mind at a time when you need it most.

Sickness and injury are always unexpected when they occur. Don't let your business be the victim of circumstances. Let me take a few minutes of your time to show you how proper planning and the right product are essential elements of future success. I will call you in a few days to set up an appointment. There is, of course, no obligation.

Sincerely,
(Your name)

C: 070221-000