**Email template to help trigger a client to review their pension.**

You can copy the content of this email and use it with your clients.

Subject line: **3 ways your retirement plans could have been impacted**

Body of email:

Dear

**3 ways your retirement plans could have been impacted**

At <ADVISERFIRM> we’re seeing an increase in clients contacting us who find themselves in one of three situations with their retirement plans.

I am here to help you to make sure your retirement plans are as good as they can be. Answering any questions you may have, I can provide you with reassurance and make sure you avoid any pitfalls.

These are the three main groups of people we’re seeing, which you may identify with. Please be assured that at <ADVISERFIRM> we’re used to supporting people in a wide range of situations and providing personal, tailored advice to put our clients’ minds at rest after a difficult year.

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| **Your retirement plans have slowed down**  Your retirement date has been pushed back. You’ve decided not to retire at this time as you are unable to enjoy retirement because celebration events (such as dream holidays) are not possible. | **Your retirement plans have speeded up**  Your retirement date has been moved forward – possibly outside of your control due to redundancy. You could be under pressure to access your pension earlier than you planned or want to. | **Your retirement plans are now in focus**  For the first time you have found yourself wanting to know when you can retire. You are suddenly motivated to sort out your retirement plans and get them into shape. |
| **Discover how I can help you** | | |
| * Make sure your investments are ready for when you do choose to retire. * Help you navigate the complex tax rules about topping up your pension if you have excess income to save for retirement. | * Help you understand all the different ways you can access your pension and how to make sure it lasts for as long as possible. * Make sure you don’t pay too much in tax and avoid the mistakes people make when they do things themselves. | * Review your current pension plans and help you find any that you have lost. * Shop around for the right deal and make sure you have the confidence that your retirement plans are now fighting fit. |

Please contact me to talk about your retirement plans. If you’d like a quick chat or advice to put your mind at rest, I’m only a telephone call away.

Yours sincerely

<insert name>

<insert telephone number>