Hi Ms \_\_\_\_\_\_\_\_\_\_? I’m June and I’m calling from The \_\_\_\_\_\_\_\_\_\_\_Agency on behalf of \_\_\_\_\_\_\_\_\_\_. \_\_\_\_\_\_\_\_ asked me to call to throw out an idea that you might be of a benefit to you. He’s been in business for over \_\_\_ years and let me tell you, he would not be calling unless he felt he could help you. Obviously, business is not normal and before COVID back in December of 2019, a law was passed called THE SECURE ACT. One of the little-known parts of that act was providing a $6,000 tax CREDIT (dollar for dollar) for up to 3 years for small business with less than 100 employees.

It’s for small businesses that haven’t had a qualified plan in the past three years. \_\_\_\_\_\_\_ felt like you might have an interest in leaning more since $18,000 could always come in pretty handy. And\_\_\_\_\_\_\_\_\_, you don’t even have to match!

Are you open to a call or visit?

If the answer back is that they DO have a qualified plan, respond with this:

Well, that’s great too! What a wonderful time to review your plan. How many employees do you have? How long have you had the plan? Would you like to see an expert take a look at what you have to help you design it to accomplish what you intended? \_\_\_\_\_, would be more than happy to take a look! Fact is, so many agents and/or planners don’t have a full understanding of qualified plans and don’t know how to help you get what you want from the plan.