

123 Main Street  
Anytown, ST 12345

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PERMIT NO. 6

*You Are Cordially Invited to  
a One on One Appointment*

RECEIVE A FREE \$100 GIFT CARD TO RUTH'S CHRIS STEAK HOUSE OR BONEFISH GRILL

John Adams  
12345 South First Street  
Austin, Texas 78602



*Dear (Guest Name),*

I would like to personally invite you to a one-on-one consultation regarding your current investment position. I appreciate your time, so you will receive a complimentary \$100 Gift Card when you attend our meeting.

Many people have watched their hard-earned retirement savings shrink considerably over the past few years. In today's uncertain financial environment, perhaps it's time to get a professional opinion on your current retirement plan. My name is **Agent Name**, and I am a Financial Professional, proudly serving the Any County area. I am offering you a Complimentary Retirement Check-up and Recovery Plan. There is absolutely no cost or obligation. Just for meeting with me, you will receive a \$100 Gift Card.

**Some of the topics we'll cover:**

- Retirement Income – Making sure your money lasts through retirement.
- How to increase income using FDIC insured CDs.
- Market Volatility - How do you help preserve your retirement account from another downturn?
- Increase returns using better Tax Allocation.
- Risk tolerance – Review and Measure your risk tolerance.
- How much you are really paying in fees?
- Fiduciary Standard – Why this is important.

**Get a Valuable Second Opinion from an Experienced, Local Financial Advisor**

When we meet, I will be glad to share with you how I have helped many other area residents plan for a more secure future for themselves and their heirs. I have reserved several dates and times for this complimentary offer. My RSVP staff will provide you with availability. Call **800-123-4567** today to book your personal appointment date and time, and the \$100 Gift Card to restaurant name is on me.



Call now to make your private reservation. Since these meetings are limited, and in order to assure a date that best works with your schedule, please call to RSVP today!

**Smith & Smith Advisors**

123 Main St. • Springfield, MA 12345

Join **Agent Name** in his/her office or the comfort and convenience of your own home as she/he reviews issues essential to making the most of your Social Security and Retirement Income.

*Appointment times are limited. Please call to reserve yours today!*

**800-123-4567**