Tax Efficiency Legacy Template Consumer Email

Scheduled webinar email template

This must be used in conjunction with preapproved firm letterhead that includes firm disclosure or preapproved email signature with firm disclosure.

Qualified plans are a good way to accumulate money for retirement — but not so efficient for transferring a legacy to your heirs.

As you near or are in retirement, you realize you don't need the money, join me to learn about an option that can help create a tax-efficient legacy for your loved ones.

Go here to register for a brief online seminar about a strategy that may be right for you.

[registration link]

[Date]

[Time]

[Presenter/host]

[contact information]

Disclosures:

[firm disclosures]

Please keep in mind that the primary reason to purchase a life insurance product is the death benefit.

Life insurance products contain fees, such as mortality and expense charges (which may increase over time), and may contain restrictions, such as surrender periods.
Policy loans and withdrawals may create an adverse tax result in the event of lapse or policy surrender, and will reduce both the surrender value and death benefit. Withdrawals may be subject to taxation within the first 15 years of the contract. You should consult your tax advisor when considering taking a policy loan or withdrawal.

This material may contain a general analysis of federal tax issues. It is not intended for, nor can it be used by, any taxpayer for the purpose of avoiding federal tax penalties. This information is provided to support the promotion or marketing of ideas that may benefit a taxpayer. Taxpayers should seek the advice of their own tax and legal advisors regarding any tax and legal issues applicable to their specific circumstances.

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On demand webinar email template

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