

# Upgrade

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## Your Retirement Plan

Dear (Client),

The IRS now allows small business owners, independent professionals and individuals with self-employment income to save significantly more for retirement. Contributions generally are fully tax deductible and can provide significant tax savings each year. And, the older you are, the more you may be able to contribute.

**Interested in learning more?** Please answer these few questions and return to me or give me a call at: **xxx-xxx-xxxx**.

**1. Would you be interested in saving more for retirement if you could take a larger tax deduction?**

- Yes
- No

**2. Have you recently changed your work situation?**

- Started a new business
- Changed jobs
- Retired, working part time
- Retired, now consulting
- Retired, no plans to work
- Other \_\_\_\_\_

**3. Do you have W-2 or 1099 income in 2016 that is not currently covered by an employer-sponsored retirement plan?**

- Yes
- No

**Some examples would be:**

- i. Consulting Income or Fees
- ii. Professional Services Fees
- iii. Income from a side business
- iv. Fees paid for sitting on a Board of Directors
- v. Expert witness fees
- vi. Royalties, residuals, speaking fees

**4. How many more years do you expect to continue to have income from your business or self-employment?**

- Less than 3 years
- More than 3 years