NFM-12342AO.2 – Nationwide Social Security Client Prospecting Email Template

Subject line: Let me help you make the choice of a lifetime.

Dear [Client Name]:

As you near retirement, you'll face many decisions that will impact your financial future. One of these is *a choice of a lifetime: when and how to file your Social Security*.

It's a complex choice that's generally permanent, and there's a lot you need to know first.

Social Security can represent about 40% of our retirement income for an average earner (lower for a higher earner and more for a lower earner), yet most retirees don't know the extent of benefits options available.[1] In fact, 2/3 thirds of future retirees did not know that they can file for spousal benefits only and then switch to individual benefits later. And, this lack of awareness could potentially result in leaving hundreds of thousands of dollars in lifetime income on the table. I don't want that to be you. As you can see, your filing choice will have a significant impact on the amount of income you receive throughout retirement.

It's also a very personal decision, greatly affected by your individual situation.

I can help you.
I would like to set up a personal meeting with you. I have the knowledge, tools and resources necessary to help you make a more informed Social Security filing decision; one that will address your specific needs.

I've included a link to a brochure to help you better understand some of the Social Security fundamentals: https://ssc.nwservicecenter.com/media/pdf/NFM-12200AO.pdf Please take a few moments to read through it, and complete the Social Security planning questionnaire I've included. Your answers will help facilitate our discussion and determine the best strategy for you.

Call me.
Let's make an appointment to face this choice of a lifetime, together.

Sincerely,
[Advisor Name]
[Contact Information]

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[1] SSA.gov Nationwide Financial Retirement Institute Social Security consumer study, 2014