LEVINSON & ASSOCIATES

Life & Annuity Brokerage since 1972

Dear Prospect,

We'd like to set up a time for you to discuss a 45-minute presentation on the unique Distribution Solution strategy we talked about last week for clients that have qualified savings accounts.

As I mentioned, there is $32 trillion in qualified savings accounts. Most people with qualified accounts have no tax strategy for taking their money out. Using the Distribution Solution strategy, money can be repositioned to grow tax-free and create a legacy for future generations. It removes all downside market risk and one key feature is that it eliminates RMD's.

The major benefits of this strategy are a substantial reduction in taxes, a considerable increase in monetary benefits while living, and sizable cash benefits to their beneficiaries.

Besides, this strategy could give your clients options for several important tax-free living benefits. Lastly, all clients will be given a scholarship program for a child or grandchild that could be worth a full one-year free college tuition to over 400 colleges.

This could really help many of your clients and make your firm look like superstars.

My colleague who will be doing the presentation is MARY READ, CPC, CPFA, QPA. Here is Mary's background:

Mary Read CPC, QPA, CPFA is National Director of Pension and Protection Planning at Pentegra Retirement Services and partner of M & R Business Development Group. A leading authority in qualified retirement plans with more than 30 years' experience, Mary has an extensive background in plan design and development and experience as a marketing executive, financial professional, pension analyst, and pension compliance manager for an international company.

Before joining Pentegra, Mary was Vice President Qualified Plan Marketing for National Life Insurance Company. National Life Insurance Company supports career and independent producers in qualified plan sales and has been dedicated to writing qualified plan business for more than 65 years. Before joining National Life Mary was a Pension Consultant with an actuarial consulting firm, and previously was Assistant Vice President of Marketing and Retirement Planning for MONY Life Insurance Company of New York.

Mary is a frequent speaker on qualified plans and contributor to industry publications. Among her credits, she has taught pension classes across the country for major financial institutions and been a featured speaker at national meetings for the Society of Financial Service Professionals, AALU, LIMRA, MDRT, and the Forum 400.

Mary is the author of three books: My Business is My Main Asset. I Want to Retire. Benefiting from a Plan, 412(e)(3) Safe. Stable. Secure and How to Use the Tax Code to Get the IRS Out of Your Retirement. Mary holds the Certified Pension Consultant (CPC) and Qualified Plan Administrator (QPA) designations from the American Society of Pension Professionals and Actuaries and Qualified Plan Fiduciary Advisor (CPFA) designation from the National Association of Plan Advisors (NAPA). Mary provides CPE credit to CPAs as a NASBA National Registry of CPE Sponsor.

Would you let me know when we could make a presentation to you and Simon and anyone else in your firm?

Thanks for your consideration.