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Retirement Planning
Services Incorporated

Dinner On Us!

Referral Campaign 2014



Retire
Now



MY REFERRAL NAMES

CLIENT NAME (S)

Name(s): _____

Address: _____

Phone: _____

Name(s): _____

Address: _____

Phone: _____

Name(s): _____

Address: _____

Phone: _____

TEAR ALONG DOTTED LINE

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Dear New Clients,

As I'm sure you're aware the past years have seen turmoil in the stock markets. A number of my clients recently expressed gratitude for my insistence that they stay in conservative investments that have performed well in comparison to the losses felt by others in the past few years.

In the coming year, I hope to add new clients who share my prudent philosophy and who have either tried (and failed) to manage their own portfolios or are dissatisfied with the advice that they've received from their financial advisors. Which brings me to my request. If you are happy with the job that I've done, may I ask you to consider introducing me to those of your friends who are unhappy with their investment portfolio or current investment strategies. If you know of anyone who would benefit from our services please fill out the attached form and bring it in to our offices, drop it in the mail, or just give us a call with the names.

We will only be accepting 3 names per client. **For every person that you refer you will receive a \$50.00 gift card to any of the restaurants listed .** In addition, you are more than welcome to join your friends at any of our upcoming seminars held at Ruth's Chris in Annapolis. See the attached flyer for all available dates and times.

Thank you in advance for putting me in touch with people who I can help in the same fashion in which I've helped you. In the meantime, if you have any questions about your own investments, as always, please don't hesitate to call me at (443-308-5200).

Sincerely,



Mike Steranka, CEO