Month XX, XXXX

Print on approved company letterhead

Name Lastname

Company Name

Address 1

City, ST ZIP

Dear Contact Name,

A lot goes into running a successful business. And there’s also a lot of planning that goes into protecting it. So, how do you figure out if you have what you need?

Start with these questions:

* Will I receive income from my business during my retirement? And if so, how much?
* Who would be a good potential buyer of my business?
* What is the value of my business, and what could I sell it for?
* If I lost a key employee, how would it impact my business?
* If I became too sick or hurt to work, how would that impact my lifestyle and business?

The good news is you don’t have to figure this out on your own. Together, we can address your top priorities and discuss solutions. That way you can stay focused on running your business.

**A great place to start**

* **Informal Business Valuation and Business Planning Report.** The value of your business can impact your retirement income planning, buy-sell agreement funding, business protection, and estate planning. Working with our team of CPAs, attorneys, and consultants at Principal®, I can provide you with a planning report that includes five commonly used valuation methods—all at no cost to you.
* **Buy-Sell Review.** If you have a buy-sell agreement in place, our team of professionals will also review your agreement and highlight recommendations based on your current business needs. Again, at no cost to you.

I’ll be contacting you soon to schedule a time for us to discuss your needs. There’s never a better time than today for creating a market for the sale of your business and making sure you’re covered for both planned and unplanned events that could impact your business.

Sincerely,

Producer Name

Producer Title

Although a Buy-Sell Review from Principal provides a valuable starting point, it does not provide you with a legal opinion as to the legal or tax implications of your agreement or to the appropriateness of any funding strategies. Principal cannot provide you with any legal document or revise existing legal documents. The valuation will not be a substitute for a formal valuation, nor does it establish a value for tax purposes. The review is intended to help identify your objectives for the buy-sell agreement and issues that must be addressed to help ensure your objectives are being met.

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