

Subject line: Taking over a loved one’s assets? You have options
Preheader: We can help you figure out what’s right for you.

Touch 2 –
Education Only

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WI CLIENT LOGO SPACE
200x75 max

<FIRSTNAME LASTNAME>
<Plan Name>

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We can help you understand your options
and determine what may work for you.

We wanted to check in to see how you were doing and if you had any questions about your **distribution options**.

If you’d like to explore some next steps for your new money and ways to help maximize it for now and the future, we’re here to help. Here are some options:



Call us at **<plan number>**.

Use our **financial wellness resources** to see where you stand and uncover opportunities for improvement.



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Investing involves risk, including risk of loss.

Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

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