

Your Letter Head

FOR IMMEDIATE RELEASE

Announcing our affiliation with

Your Town – Current Date – Agency Name is please to announce an expanded capability in qualified plans for small businesses and professional corporations.

We have entered into a strategic alliance with a group of ERISA experts, which greatly enhances our ability to serve you and your clients.

Our design team routinely creates 401k plans that allocate 70% to 90% of plan contributions to stockholder/employee accounts. In addition, our 412i plans are both innovative and safe harbor.

We have identified over 60 provisions of ERISA and EGTRRA that can help the small business owner maximize the plan contributions that accrue to their benefit. Best of all, our initial consultations are free. It costs nothing to find out how much we can save your clients in taxes.

We will be conducting Web based seminars to acquaint financial professional with services. In addition, we have a number of CPA CE credits on our website. Feel free to browse at your leisure or call us for a guided tour.