

SAMPLE ATTORNEY/CPA PROSPECTING LETTER

<<Date>>

<<Attorney/CPA Name>>

<<Firm Name>>

<<Address>>

<<City>>, <<State>> <<Zip>>

Dear <<Attorney/CPA Name>>:

Do you have clients whose needs have changed regarding their life insurance policies? They may no longer have a need, a desire or be able to afford their current policies. In the past, their options were limited to letting the policy lapse and receiving nothing, or surrendering it to the insurance company for a predetermined amount.

Times have changed, and we are offering what every client is entitled to: ***Choice***.

There are many reasons why people may no longer need their current policies. The closure of an estate, the death of a loved one, a failed marriage, a change in a business venture, an increasing estate tax exclusion, or a financial hardship, are all common reasons.

With the growth of life settlements which are the sale of a client's policy in the secondary market, life insurance has become a tangible asset...something more than just a death benefit. Life insurance has become like a home, an investment portfolio or real estate.

Through my relationship with 3 Mark Financial, a company specializing in both traditional life insurance and life settlements, we can help you determine what your clients' policies are actually worth. With this information, you will be able to help them decide whether their policy still meets their needs or not.

*Consumers now know that if they...no longer need (or are no longer able to afford) their life insurance policies, they will be able to sell the policies for their fair market value instead of having to surrender them for the low price offered by the insurance carrier.**

Let us help you give your clients the choices they deserve. To learn more about life settlements and how they can benefit your clients, please contact me at (xxx) xxx-xxxx. Thank you.

Sincerely,

Financial Advisor

*American Bar Association, "The Benefits of a Secondary Market for Life Insurance Policies" by Neil Doherty and Hal Singer