

Advisor Recruiting Letter *(part of 12-letter drip campaign)*

Dear Advisor:

A sleeping giant of a market is the millions of small, closely held businesses throughout the United States with less than 100 employees... and we can help you tap it.

These small businesses offer countless opportunities for brokerage firms to meet a range of financial needs, and (Firm Name) Business Owner Services Group plays a vital role in helping our advisors compete in this market.

I've enclosed a guide for you that describes our services for closely held businesses. Give me a call after you look it over.

(Firm Name) is committed to the closely held business market for several reasons:

- **Cross-selling.** Many of our individual clients are closely held business owners. If our advisors are already handling their personal portfolios, they can parlay this relationship into added services for their business.

Referrals. Attorneys, CPAs, bankers and tax advisors can refer their business owner clients to our advisors they have relationships with.

- **Repetitive business.** With periodic fee income from many business services and continuous employee retirement plan contributions, our advisors can "annuitize" their business and rely less on the day-to-day grind of the individual transaction business.
- **Protection for the advisor's book.** Many single-service providers, such as life insurance agents, are after this market. But as a *multiple service provider*, (Firm Name) advisors can leverage themselves with their clients and keep their competition at bay.

If you'd like to know more about how you can incorporate more of this market in to your business plan, or how (Firm Name) Business Owner Services Group can work with you to penetrate more of this market, give me a call at the number above.

Sincerely,

Director of Recruiting