

Subject line: (first name), Help Us Help Protect Your Financial Health – Please Take This Survey

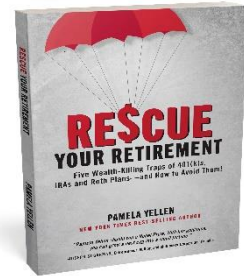
Hi (first name),

We are all experiencing tremendous upheaval during the coronavirus chapter of our lives. It is a time of fear, uncertainty, chaos and loss of assets. We want to help you sort through the many choices you have that could safeguard your retirement savings and provide a sense of stability and security.

In order to do that, we need to get a good sense of how you're doing financially right now, and what specific concerns you have.

Please click on this link to take the survey. It won't take long, maybe 10 minutes of your time.

As a “thank you” for completing the survey, we have a free gift for you! When you send us your answers to our survey, we'll mail you the newest book by N.Y. Times bestselling author Pamela Yellen called *Rescue Your Retirement*. This timely book takes aim at the shortcomings of conventional retirement plans...and what to do differently to build true financial security!



Based on your survey answers, we can prepare a financial analysis for your unique situation, if you would like. Our team can contact you to schedule a time to meet with me **virtually** (at least for now!), from the comfort of your own phone, computer, or laptop.

I would like to personally offer our team's support to you during these challenging times! I hope you and your family are safe... and in good health.

Here's to your Financial Health too!

Best Regards,

Stuart

Stuart Grossman

[[Survey Link](#)]

Survey Questions

1. First and Last Name
2. Your email address
3. Your cell phone number

Note: for any questions below with a 1 – 10 scale, 1 = low, or not happy/satisfied, and 10 = high, or very happy/satisfied

4. How are you and your family doing overall? 1 2 3 4 5 6 7 8 9 10
5. Has the current situation affected your family’s finances? Yes / No
6. Has this recent market downturn had any effect on your retirement savings? Yes / No
7. How do you feel about this? (Choose 1 answer below)
 - a. We’re all doomed!
 - b. It’s had a major impact on my retirement savings, which may never recover.
 - c. It’s had a large impact and I don’t know what to do next about this.
 - d. Yes, my retirement savings have dropped some, but they will eventually come back up in value when the markets heal.
 - e. My retirement savings have not taken a hit, so no worries at all!

8. How would you rate your confidence level in your own financial plan? 1 2 3 4 5 6 7 8 9 10

9. Are you saving enough money for your retirement? Yes / No

10. My (Our) biggest financial challenge is:
_____.

11. If Stuart would answer just one question, it would be this:
_____.

12. Are you open to ideas about ways to stabilize your retirement savings during market downturns? Yes / No

13. I would like to have a “virtual” chat with Stuart soon about my current financial situation, to see if he can help us. Yes / No

14. To what mailing address shall we send your free book, *Rescue Your Retirement*?

Thanks for answering our survey questions!

