

Retirement Account Comparison

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

Dear [Recipient's Name],

I hope this letter finds you well. As you approach retirement, I would like to provide you with a comparative analysis of your retirement accounts to assist you in making informed decisions regarding your financial future.

Account Comparison Overview

Account Type	Current Balance	Annual Contribution Limit	Tax Treatment	Withdrawal Rules
401(k)	[\$[Insert Amount]]	[\$[Insert Amount]]	Pre-tax	Must be 59 1/2 years old
Traditional IRA	[\$[Insert Amount]]	[\$[Insert Amount]]	Pre-tax	Must be 59 1/2 years old
Roth IRA	[\$[Insert Amount]]	[\$[Insert Amount]]	Post-tax	Contributions anytime, earnings after 59 1/2

Recommendations

Based on your current financial goals and situation, I recommend considering the following:

- [Insert Recommendation 1]
- [Insert Recommendation 2]
- [Insert Recommendation 3]

Please feel free to reach out to me if you have any questions or need further assistance.

Best regards,

[Your Name]

[Your Title]

[Your Contact Information]