

Proposal for Tax-Deferred Investment Options

Date: [Insert Date]

Recipient Name: [Insert Recipient Name]

Recipient Address: [Insert Recipient Address]

Dear [Recipient Name],

I am writing to propose a range of tax-deferred investment options that can significantly enhance your financial growth while minimizing your tax burden. After analyzing your current financial situation, I believe these options will align well with your long-term financial goals.

Proposed Investment Options

- Individual Retirement Accounts (IRAs)
- 401(k) Plans
- Health Savings Accounts (HSAs)
- Deferred Annuities

Each of these options offers unique benefits that can help you maximize your investments while deferring taxation until withdrawal. I recommend scheduling a meeting to discuss these options and tailor a strategy that fits your needs.

Thank you for considering this proposal. I look forward to the opportunity to assist you in securing a prosperous financial future.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]