

[Approach email – consultant to adviser]

Subject line: Switch your client's workplace pension scheme and help them save

Hi [IFA's name],

We all know that many businesses are struggling right now as a result of the continuing pandemic.

Around half of all UK businesses have less than 6 months cash reserves and are taking measures to reduce their costs.

If reducing business costs is high on any of your clients' priority lists, reviewing and switching their workplace pension scheme could be one way to help them save.

Why should I consider switching my client's workplace pension scheme?

As well as helping them save money, reviewing their pension scheme can also ensure they receive improved service levels and support, and better long-term outcomes for their scheme members.

What's in it for you?

Reviewing your clients' schemes can be a good opportunity to generate new corporate and wealth clients and create future profitable revenue streams for yourself.

How we can help?

We know that switching pension schemes can feel like a daunting task for both employers and advisers. To support you and your client conversations, we've created a case study that clearly illustrates the potential benefits of switching workplace pension scheme and highlights the award-winning levels of support we can give you and your clients.

We also have salary exchange material that explains this arrangement in a simple jargon-free way.

Want to know more?

I'll be in touch to find out if you'd like to know more about switching your clients' workplace pension schemes and the business opportunities associated with this.

If there's anything else I can help you with in the meantime, please get in touch.

Kind regards,

[Name]

[Title]

[Tel no]

[Email]