



Roth IRA Elevator Pitch and Voicemail Scripts

Elevator Pitch:

With taxes increasing for some individuals in the near future, many of my clients are concerned about giving even more to the government. Many have converted their traditional IRA's to a Roth because the Roth allows for tax deferred accumulation and tax free income. In the past, not everyone has had the option to convert, but in 2010 everyone may. If you and your tax advisor have determined that a Roth conversion is appropriate, please contact me at _____.

Reg Rep. Voice Mail:

Hi _____, reason for my call is that with taxes and inflation on the rise, many of my clients are asking me to work with their tax advisor to take advantage of upcoming tax changes that could help lower their bill and enhance their estate planning. Please give me a call at _____ for details. I look forward to speaking with you.

Hi _____, reason for my call is to make sure you and your tax advisor are aware of the upcoming 2010 changes regarding Roth IRA's that could lower your tax bill. Please give me a call at _____ to see if it might make sense for you.