



Re: Birmingham Follow up 

to: Brandon Rowell, Jeffrey Trinkwon, [REDACTED]

03/20/2009 10:38 AM

History: This message has been replied to.

Brandon,

This is an excellent email, thoughtfully presented and frankly a template email for an overview of retirewise to inst. accounts.

Much appreciated!

[REDACTED]  
Brandon Rowell

----- Original Message -----

From: Brandon Rowell

Sent: 03/20/2009 10:04 AM EDT

Cc: [REDACTED].com; [REDACTED].com; Michaela [REDACTED];

[REDACTED].com; [REDACTED].com; "[REDACTED] [REDACTED]"

[REDACTED].com>; [REDACTED].com; "[REDACTED] [REDACTED]"

[REDACTED].com>; [REDACTED].com; [REDACTED] [REDACTED];

[REDACTED] [REDACTED]

Subject: Birmingham Follow up

Good Friday morning!

I hope everybody has survived the work week and is looking forward to a relaxing weekend.

Considering the state of the economy, I feel that its important to follow up on our conversation regarding retirewise from the annual meeting in Birmingham.

I realize that everybody has a ton on their plate with shrinking dollars, shrinking jobs, and concerned employees. But Retirewise fits right into these times... with minimal effort from HR.

Through 4 elective group modules, employees will receive FREE, EDUCATIONAL information that builds their financial knowledge from ground zero through presentations, group participation, and homework... yes homework. Retirewise builds this knowledge while incorporating the current benefits offered to them through Fruit (MetLife programs AND Others) with the ultimate goal of having employees intelligently invest their dollars according to their own specific financial situation.

#### HR Request:

As stated above, minimal effort from your part is needed.

1. We need to hold an implementation call to discuss rollout - (where we collect information on other programs offered so we can incorporate)
2. We need approval on communication material
3. We need a cafeteria or conference room to set up
4. We communicate the program

I have chosen a few slides from our presentation (attached) that:

- Illustrates the employee's needs

- Describes each module
- Shows a sample time line
- Includes examples of Employee marketing
- Provides satisfaction results from other participants

Again,

I realize that you already have a significant amount of work on your plates, but as illustrated on the last slide of the attachment employees find this program extremely valuable.

Please let me know if you have any questions or concerns!

[attachment "Retirewise.ppt" deleted by ██████████ ██████████]

Thanks,

Brandon Rowell  
Client Executive  
Metropolitan Life Insurance Company®

----- OUR OFFICE HAS MOVED -----

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1200 Abernathy Road NE  
Bldg. 600, Suite 1400  
Atlanta, GA 30328

Office: ██████████ ██████████  
Fax: ██████████ ██████████  
Cell: ██████████ ██████████

FINRA Registered Representative  
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