## **When You Have a Custom Report**

## LinkedIn InMail

Subject: Your Schwab 401(k) Opinion

Hi \_\_\_. My name probably does not look familiar. I found your profile on Linkedin.

My investment advisor firm specializes in providing investment advice to individual company 401(k) retirement plan participants who have Charles Schwab as their retirement plan provider.

I currently publish a detailed ranking list of the mutual fund options on your \_\_\_ 401(k) retirement plan menu. I am in the process of making this weekly information available to more people at \_\_\_, and I'd love to get your input and suggestions for improvement.

Would you have an interest in looking at my \_\_\_\_ mutual fund ranking for this week?

Hope to hear from you soon,

Ric Lager

Subject: Your [name of company] Schwab 401(k)

Hi [First Name]. My name probably does not look familiar. I found your profile on Linkedin.

My RIA firm provides investment advice to individual Schwab 401(k) participants.

I publish a ranking list of the mutual fund options on your [name of company] 401(k) retirement plan menu. I am in the process of making this weekly information available to more people at [name of company], and I'd love to get your input and suggestions for improvement.

Would you have an interest in looking at this week’s mutual fund rankings?