



## **REALTOR RETIREMENT PLAN**

Hello \_\_\_\_\_,

My name is Kevin Bartlett, I am a local real estate agent and have been in business since 2016. I'm reaching out to you as I am familiar with your work, and would like to discuss a potential partnership.

In watching the market and other agents, you stood out - with an exceptional book of business, clients, transactions and great personal brand. But, the question I want to present to you is this.

### **What do real estate agents have when they are ready to move onto the next stage of life?**

I've been contemplating this for myself, mapping out my long term goals for my own career, and I realized other than perhaps developing a brokerage or a team - retirement for an agent can be difficult. I'll spend decades growing my business, only to have it mostly disappear (if and when I want to retire). And, there isn't a good solution to monetizing those connections and clients I've built up throughout the years without me continuing to be at the helm day-in-day-out. Then it hit me, perhaps a coordinated transition and partnership would work?

What happens when you want to take a vacation with your spouse? What happens when the grandkids want to have their grandparents be there for special events? What happens when you finally just don't feel like getting out of bed for anything less than a \$350,000 sale?

The answer to these questions is why I'm reaching out to you today. Rather than eventually wind down and become a listless agent (giving up years of time, money, and effort you built into this business), instead you could simply merge with an agent that is a rising star and has 40 years left in the tank?

That's why I'm proposing an initial phone call and sit down to discuss this possibility. If nothing else, I'd love to get your feedback on the idea and pick your brain. I see this as a long term transition - perhaps me taking on a few initial test deals to smooth out communication, outline processes, and build trust. And we start with simple (but higher-than-normal) referral fees. Allow me to help you get the most out of your business now, and if one day you decide to transition out of the business, I can help develop your existing clients into an ongoing financial tool that consistently provides you income.

### **My Background**

I was born and raised in Estero. Went to College, and shortly after decided Real Estate was the industry for me. Starting in 2016 I sold over \$5,000,000 worth of property in my first partial-year. In 2017 I sold 28 homes. In 2018 (my third year in business) I sold over \$10,000,000. Last year I sold about \$20,000,000. Finally in 2020 I've been able to sell approximately \$30,000,000. I present these numbers as evidence that I'm hard working, hungry, and can manage significant growth.

My goal is to continue to sustainably grow the business year-in-year out, and have already been making significant investments in technology, marketing, advertising, and personnel to allow me to do so.

I have the infrastructure in place to handle more deals and we are looking to expand our market share in Southwest Florida. By partnering with agents such as yourself that are established we are looking to create an opportunity for the agent to create an income after they are ready to slow down in the selling process and collect larger-than-typical-referrals.

I'd like to take 15 minutes out of your busy day to discuss this opportunity, and learn more about you. I'm sure I can provide tremendous value immediately and can set the stage for a longer-term retirement hand off.

Please reach out directly to me at 239.826.1891. You will not regret this call!