

# Use this sample cover letter to call attention to the articles in your newsletter

This letter must be used with your compliance-approved letterhead or email signature.

[Date]

Dear [Name],

For the IRS, tax-filing season started in January, but for many Americans the season's end is quickly closing in on them. It is this time of year when you realize how important it is to have your financial life in order throughout the year. When it is, this time of year is usually much less hectic and stressful. Planning for taxes goes hand-in-hand with planning for all your financial goals, from that new car in your future, to retirement funding and preparing for your kids' college education.

This issue of the Let's Talk Money newsletter features a section about college funding, including options that may be related to your tax return. If you have children aged 0-21, you should be aware of all the government programs that may be available to you.

In the meantime, consider working with a tax professional when preparing your return. It could save you time and money. I can work with you and your tax professional to help make sure your financial products, tax plan and goals are in sync throughout the year. Let's get in touch soon to make sure your financial life is in on track, so next year's tax season will be easy for you AND you will not have to worry about your financial life until then.

Sincerely,

[Name and Company-approved title]

*This material is for use with the general public and is designed for informational or educational purposes only. This document is not intended as direct investment, legal or tax advice. The tax information was written to support the promotion or marketing of the topics addressed. Since insurance agents and registered representatives are prohibited from providing tax or legal advice, be sure to consult with your attorney and tax advisor regarding your particular situation.*

*Each insurer is solely responsible for its own financial condition and contractual obligations. Most insurance policies contain exclusions, limitations, reductions of benefits and terms for keeping them in force. I'll be glad to provide you with cost and complete details.*

*[NOTE: Add your company's compliance control or approval number when required.]*

- *This letter has been reviewed by FINRA and various compliance departments, but we suggest that you contact your compliance department to confirm approval prior to use.*

## **We appreciate your ideas and suggestions and would love to hear them.**

Please contact us anytime. If you know someone who would benefit from these newsletters, we would be happy to send them a free package. You could be eligible to receive considerable savings on your next order through our referral program.

**Call Sales for more details at 1-800-243-5334.**