

# 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],

*As hard as it is to believe, we are into the second half of 2018 already. With time flying at warp speed, it might not be too early to start thinking about what you would like to accomplish financially before yearend. For example, are there some things you can do to cut your tax bill? Maybe boost your contributions to your retirement plan?*

*Another way to save on taxes is to make tax deductible contributions to your favorite charities. The new tax law allows taxpayers to deduct cash donations to qualified charitable organizations of up to 60% of their adjusted gross income annually. The inside pages of the enclosed newsletter features more information about this new tax savings opportunity, along with other helpful financial tips for this time of year.*

*If you would like to discuss additional ways to help meet your 2018 financial goals, please give me a call. I would be happy to assist!*

*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.**

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