

# 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],*

*Old, young or in between, people are always looking ahead to their future — making plans. That applies to their financial lives, too, because as we age our families and careers change, as does our financial situations.*

*The enclosed newsletter touches on financial topics for people at different stages of their lives, from college savings to wills and estate strategies. No matter what stage of life you are in, planning ahead is important and when it comes to your financial future, the sooner you do so the better.*

*The most fulfilling part of my job is the long-term connection I make with my clients. I pride myself in helping provide them with guidance at every stage of their financial lives. Please know that I am available to answer questions or meet with you anytime you feel that I may be able to help.*

*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.

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