

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],

Happy New Year!

It's that time of year when many people think about their financial goals for the year. It is, after all, a great time to review the past year and determine how to do even better in the coming year. But simply making a resolution will not get you where you want to be. Consider this:

According to a November, 2017, Harris Poll of over 2,000 U.S. adults 74% of those who had money goals for 2017 abandoned them in less than six months and 21% in less than two weeks.

Don't let this discourage you. To help increase the chance of success, it is important that you take a realistic look at your current circumstances, hone in on future plans and work through the details. Even big goals should to be broken down into small steps that you can stick with throughout the year. Doing this not only makes it feel less overwhelming, but when you complete each step your sense of satisfaction motivates you to stay with the plan.

Are you ready to get started? I can help guide you through this process. I'm ready if you are!

Sincerely,

[Name and Company-approved title]

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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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