

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],

You may find that dealing with the mounds of financial paperwork feels like a never-ending battle, but there are some things you can do to help make that process more manageable. This issue of the newsletter includes some good ideas that could help you to do that.

For example, consider using electronic services offered by most financial institutions. That could help eliminate that paper mess, simplify billpaying and reconciling accounts while consistently providing more information at a glance.

Of course, going electronic requires that you protect yourself online, so be sure to review the tips on how to do this, too.

As you gather information to do your taxes this spring, consider some of the life hacks discussed which may help make your financial life a little easier in the future.

As always, if you need additional information regarding your insurance and retirement planning needs, feel free to call me.

Sincerely,

[Name and Company-approved title]

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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. This letter was prepared for the sender by LTM Marketing Specialists LLC, an unrelated third party.

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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