

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],

I think that most of us are eagerly looking forward to a fresh start with the New Year. Some people are already preparing for a better year. They have been working with me to complete some financial chores that they had been putting off.

Perhaps it would help you feel more optimistic about 2021 knowing that your financial situation is aligned with your goals. Whether you want to plan for retirement, college funding, a new house or just make sure you have all things financial covered and on track, I am available to guide you through the process.

Why not wrap up the year knowing you have done all you can to help ensure a financially secure future for you and yours. Give me a call to set a mutually convenient time to get together.

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.

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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