

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!

The pressure is on—tax time. It is the one time each year that we all have to look at our finances. Some people like to conduct their annual review at this time, which is smart. Others may simply want to power through and get done, not looking at their financial picture again until next year. Less smart.

Either way, I want to encourage you to do the smarter thing and remind you to contribute to your IRA. In addition to boosting your savings, you may be able to deduct your contribution and reduce your tax bill in the process. Let me know if I can help you with your retirement contribution. I would be happy to help with the paperwork!

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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