

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],

Summer is over. Fall and all that entails, including sending kids back to school, is upon us. As you make plans for the winter be sure to consider your finances. Whether you are saving for a new house, retirement or you kids' college education, you will find tips in this issue of the newsletter.

While these tips may be helpful and trigger some thoughts or questions, I hope you understand that there is always more to know than what can be included here and that I can be your resource to answer questions, provide solutions and products and help guide you for the long haul.

If you are ready to meet and discuss ways to help make your financial life less stressful and better organized, so your money is working toward your goals, give me a call. I would like 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. 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.

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.

Call Sales for more details at 1-800-243-5334.