

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, which may be found on your company approved business card, letterhead, or email signature.

[Date]

Dear [Name],

Some important topics are mentioned in the enclosed newsletter. You know, the tasks that you never get around to doing. Things like monitoring your spending so that you can find places to cut, ways to eliminate debt once for all, and ultimately create a realistic budget.

Another task involves planning. It may be not easy to think about, but do you need to create or update your estate strategy? Obviously, you want your family to be protected should the unthinkable happen. So, take the steps to ensure your needs and wishes are met.

I mention these ideas now because you are probably dealing with taxes and finances. Taking care of additional financial tasks fits well with that process, and it's a good thing to have everything taken care of for the rest of the year.

I am happy to assist you in addressing tasks that you need to complete. Please call my office to arrange a mutually convenient time to meet.

Sincerely,

[Name and Company-approved title]

This material is for use with the 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 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.

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