

# 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],*

*It's been a challenging year so far. Energy costs, foreign affairs and federal spending levels have contributed to inflation, higher interest rates and a volatile stock market.*

*Now, more than ever, we need to keep a level head and focus on personal financial goals. I suggest that we meet to review your financial situation, including goals, budget, retirement, college savings and risk management. It is important to make sure that your current circumstances, goals, and finances are aligned and on track in light of all that has changed.*

*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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