

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],

As you prepare to file your 2022 taxes, like most every American, you're probably looking for every deduction to which you are entitled. That is why I want to remind you that you may be eligible for a valuable tax deduction while boosting your retirement savings.

The deadline for making a potentially tax-deductible contribution to a traditional IRA is April 18th—even if you file for an extension. As with every tax break, there are requirements. The article in this newsletter touches on some of them.

If you are interested in finding out if you qualify for a deductible IRA contribution, please contact me. I would be happy to help you with this from beginning to end. I also can work directly with your tax professional.

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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