

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],

Everyone's financial situation is different. Some earn more, some less. Some have children, others may be caretakers of loved ones. Then there are age differences. Some are starting out with their financial strategies; others may be preparing to retire.

Those differences are what keeps my job interesting! And this time of year is one of the busiest, as people are looking at their finances and preparing to file their taxes.

That is why I want to remind you that some of you have a potential opportunity to increase your retirement savings, while cutting income taxes. Others may be at the point where rolling over monies to a Roth IRA may make sense.

If you would like to review your overall financial strategy or better understand if you should be taking advantage of some of these investment opportunities at this time, please do not hesitate to call my office to schedule a 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.

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