

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],

You may have read about the “great wealth transfer” recently. It refers to the money baby boomers will leave to their heirs. While the amount inherited may vary, keep in mind that any amount is a windfall that should not be taken lightly.

An inheritance presents a financial opportunity that may only occur once in a lifetime. However, it can also present an overwhelming task for anyone who is not prepared to handle it.

The good news is that help is available. Your team of trusted financial, tax, and legal professionals can help guide you through the process. They can suggest options and help you to learn how an inheritance might affect your financial situation and taxes.

Take your time to use this opportunity to help ensure that you use those funds in a way that benefits you the most. The important thing is to wait for emotions to subside, avoid squandering funds frivolously, and wait until you feel well-informed before making big decisions.

Please feel free to call me for any information and guidance you may need.

Sincerely,

[Name and Company-approved title]

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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.

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