

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.

Dear {Recipient Name},

That was fast. The year is nearly over. It rushes by because we Americans are usually on the go. But I strongly encourage you to slow down long enough to conduct a year-end financial review.



During challenging financial times like these, most Americans need all the help they can get to keep their financial life on track. That's what financial reviews are for. This exercise provides you the opportunity to look at your financial situation—the big picture—and make any necessary changes to keep your plan current with your goals.

During the review, we will discuss the status of your investments and insurance coverage. I can refer you to legal assistance if you have not established an estate plan. Finally, it is important to consult with your tax advisor to find every tax-saving opportunity that may expire on December 31. Please call my office to schedule a convenient time to meet.



**Of course,
I am here to help!**

P.S. I understand that the holiday season is busy. However, taking care of your financial health is important. Our session will not take a lot of time. Most clients say that reviewing their situation and strategy for the future leaves them feeling less stressed about their finances.

Sincerely,

{Name Signature}

{Name and Company-approved title}