

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},

On July 4, 2025, the One Big Beautiful Bill Act (OBBBA) was signed into law, and we've had some time to better understand the provisions and expirations for individuals and businesses.



The beginning of the new year is also a good time to review your withholdings, beneficiary designations, build your emergency fund or get started on one, and get your finances back on track after the holiday season.

It's also a good time to connect to discuss any major life changes you expect over the coming year that might require changes to your plan to stay on track. This could be plans of getting married, starting a family, purchasing a new home, or children leaving the nest.

Let's setup some time to discuss, please feel free to contact me at your earliest convenience.



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

Sincerely,

{Name Signature}

{Name and Company-approved title}