

# 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},

As we approach the midpoint of 2026—a milestone year celebrating America’s 250th anniversary—now is the ideal time to review your financial picture and ensure you’re on track toward your goals.

This mid-year newsletter provides practical guidance to help you stay aligned amid changing markets and life events. Begin with a portfolio review: Check your asset allocation, risk tolerance, and strategy. Rebalance if needed to match your intended risk level and long-term objectives.

We also cover key estate planning basics—wills, powers of attorney, and trusts—to safeguard your legacy, especially after major life changes.



For summer, explore budget-friendly vacation tips, top trending destinations (national parks, historic cities, and coastal escapes buzzing with America 250 events), and ways to create lasting memories affordably.

Families will appreciate updated 529 plan flexibilities, including expanded K-12 uses, apprenticeships, and Roth IRA rollovers for recent graduates.

**Additional insights include peak-season car-buying deals and frugal gardening tips. Let’s schedule your mid-year check-up to personalize these strategies for your unique situation.**



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

Sincerely,

*{Name Signature}*

{Name and Company-approved title}