

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.

[Date]

Dear [Name],

2020 presented the world with one of its greatest challenges ever; A perfect storm during which I think it is safe to say that most people have come to realize they cannot take anything—or anyone—for granted. That applies to everything financial as well, which is the one aspect of this ordeal where I may be able to help.

We all watched how the longest economic expansion in history did an about-face, becoming a recession in a matter of days. It is the first recession brought on by countries shutting down economies due to a pandemic. And while the cause of this economic turnaround is unique, the guidelines for bear market investing have not changed.

It is important to look ahead and remain focused on your financial goals. Conducting a review of your portfolio and making adjustments as necessary can help get various aspects of your financial life tracking in the right direction again. When you are ready to do this, please give me a call. I can help guide you through this process. Take Care!

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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