

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],

Happy New Year!

I'd like to help you work toward making 2021 your best year financially. This is the time to make the commitment to financial health improvements. That is why the January/February issue of the newsletter discusses behaviors that will help you get started.

The process includes a list of things to check-off. Depending on your personal situation, you may need to start with a realistic spending plan, risk management, written goals and strategies to help achieve them. There are other things that may need to be addressed with the help of your financial team including drafting a will, establishing a trust, clarifying guardianship for minor children and perhaps strategies for your estate. No one enjoys talking about such things, but it is critical that you address them and keep documents current.

Make a commitment to financial health. I am here to help!

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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