

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],

As you prepare to file your 2018 taxes, you may discover that parts of your financial information are not easily accessible or as organized as you'd like. Now, with the 2019 tax year just under way, it's the perfect time for you to get better organized so that your tax preparation will be easier next year. Just in time to help you get started, this issue of the newsletter is packed with ideas to help you better organize your finances.

Also, keep in mind that you may be able to reduce your tax bill by contributing more to your retirement plan(s) before you file. I would be happy to help you figure out how much more of a tax-deductible contribution you could make.

Sincerely,

[Name and Company-approved title]

This material is for use with the general public and is designed for informational or educational purposes only. This document is not intended as direct investment, legal or tax advice. The tax information was written to support the promotion or marketing of the topics addressed. Since insurance agents and registered representatives are prohibited from providing tax or legal advice, be sure to consult with your attorney and tax advisor regarding your particular situation.

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.

Please contact us anytime. If you know someone who would benefit from these newsletters, we would be happy to send them a free package. You could be eligible to receive considerable savings on your next order through our referral program.

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