

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.

[Date]

Dear [Name],

Here it comes again... Autumn. Adapting to Fall can feel rather abrupt. Suddenly kids go from vacation mode to school, which affects parents' schedules, too. In addition to a new routine, parents — whether employers or employees—are also likely dealing with employee benefits open enrollment.

You're busy! But I want to remind you to take time to seriously address the financial decisions that are required of you this time of year. There are money-saving tax and investment opportunities that disappear after December 31.

Of course, I am here to help! Working together—with your tax advisor—you'll understand every tax and financial opportunity available to you. Just call to schedule a convenient time to meet.

Sincerely,

[Name and Company-approved title]

This material is for use with the 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 situation. This letter was prepared for the sender by LTM marketing Specialists LLC, an unrelated third party.

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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