Financial Professionals Should Place the Text of This Document on Their Own Company Letterhead

Date

Client Name
Address
City State Zip

Dear Client Name,

Increasingly, regulatory agencies are dialing up their focus on requirements for financial professionals. Many states are revamping their laws, especially as they relate to prudent investments.

As (a/your) financial professional, I have in the past and continue to follow the Prudent Man Rule. The one area of review that has lacked somewhat has been in regularly reviewing your life insurance assets. As regulatory agencies revamp their laws, more attention is being focused on inclusion of fiduciary responsibility to include life insurance.

To that end, I will call you in the next week to arrange a convenient time for us to meet. At that meeting, I will share with you the process I plan to follow to provide the very best in serving your needs.

Sincerely,

Financial Professional Name

FINANCIAL PROFESSIONALS: REMOVE INFORMATION BELOW BEFORE SENDING TO YOUR CLIENTS

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