

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

Date

Client Name

Address

City State Zip

Dear Client Name,

We would like to take a moment to share with you something that can make a big difference in your family's future as well as your own.

Our team at XXX prides itself in providing the most comprehensive planning solutions to fit your financial needs. What about all the other things that may be changing in your life, such as a change in marital status, having a baby, starting a new job, or another life changing event? With all of these changes, shouldn't you also take a good look at life insurance, long-term care insurance and/or disability insurance? As part of our continued dedication to protecting our clients, we are starting a new initiative offering access to a comprehensive portfolio of insurance products. We know that there are many options available to you. It is our job to review your current situation and ensure we find the best solution to fit your needs today and in the future.

Please give us a call today to schedule a complimentary review of your family's protection plan. No matter where you are in life, now is the time to ensure that your family is protected. This would also be a good opportunity to review your beneficiaries and existing Life Insurance policies.

We look forward to meeting with you soon.

Sincerely,

Financial Professional Name

**FINANCIAL PROFESSIONALS: REMOVE INFORMATION BELOW BEFORE SENDING TO YOUR CLIENTS**

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