

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.

Dear {Recipient Name},

As 2025 nears its end, strategic financial decisions can set you up for success. It's best to be prepared to be able to make smart money moves during the holiday season before year-end.



Consider reviewing contributions to retirement accounts or make charitable donations to maximize your tax deductions. Review your investment portfolio to ensure it aligns with your short- and long-term financial goals.

For holiday budgeting, create a spending plan to balance festive joy and financial discipline by prioritizing essential expenses, setting gift-giving limits, and leveraging cash-back rewards to stretch your budget.

These steps can help you through the end of the year and help keep you on track for the new year. Let's make your year-end financially strong!

To setup a year-end review, please feel free to contact me at your earliest convenience.



**Of course,
I am here to help!**

Sincerely,

{Name Signature}

{Name and Company-approved title}