**Prospect Awareness Cover Letter**

Date

<Client>

<Address>

<Address>

Dear <client>,

At \_\_\_\_*(your financial firm)* \_\_\_\_\_, we take our responsibilities to our clients very seriously. **In addition to providing investment direction and advice, we also offer information and reports that can help keep our clients continuously informed on issues that affect them.**

To address critical areas for our clients, we often offer reports and newsletters. Included with this letter is one of the recent mailings we sent to our clients that keep them informed on any important issues that may affect them.

I am not sure that your current investment professional is addressing all your financial needs for you. We find that most financial professionals do not leave off critical areas on purpose but rather they make mistakes or don’t address critical areas because they are not familiar with this information. If this is information that you have already received elsewhere, that is great! If it isn’t, and you would like us to evaluate your total investment picture, we would like to offer you the ability to **come in for a NO OBLIGATION financial check-up. To schedule this session, please call us at (xxx) xxx-xxxx.**

We would like the opportunity to review your tax plan, estate plan, investment plan, retirement plan, and protection plan and make sure that they are all coordinated in your best interest. We will be calling you within the next few weeks to see if you can benefit from our services.

Until then, enjoy this report, compliments of us.

Yours truly,

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*Address*

*Broker/dealer*