



Additional Information Letter (VA, VUL, MF)

Enter date

Enter Client's Name

Enter Client's Address

Enter Client's City, State and Zip Code

***"Wisdom is knowing what to do next,
skill is knowing how to do it, and virtue is doing it."***

–David Star Jordan

Dear *Enter Client's Name(s)*:

At (Your Firm Name Here), we would like to congratulate you on having the wisdom to know what to do next and the virtue of doing it. For you that meant taking a number of steps to create a better future for you and your family. You may recall some of those steps were selecting a variable annuity with _____, a variable universal life with _____ and mutual funds with _____.

As we are in the process of updating the kinds of information we provide clients, it came to our attention that you might be interested in some of the new information we have regarding Variable Annuities, Mutual Funds and Variable Universal Life. Consequently we have attached descriptions of them. Please review each one and insert them in your binder.

Although there is nothing new in these letters, we thought you might like to have something in writing for your files.

By all means, if you have any questions at all about your investments, or if we could serve you in a better way, do not hesitate to call me at (your direct number here) or via e-mail (your e-mail address here).

Looking forward to seeing you at our annual barbeque on either (date) or (date).

With warmest personal regards,

Your Firm Name Here

Your name

Title

PS: Our next dinner seminar is on Enter date and time AM/PM. Would you like to bring a friend?