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Mr AB Sample
Sample Street
Sampletown
Sampleshire
SA1 2MP

Dear Mr Sample,

I notice from our records, that you are only a few months away from making your final mortgage payment.

I'm sure you're looking forward to this important milestone in your life and now may be a good time for us to meet to discuss your financial future.

One thing to consider is your ongoing protection needs. Once you've paid off your mortgage, any life insurance linked to your mortgage may also come to an end. Now could be an ideal time to assess your life cover needs, and help you put protection in place.

Most of us want to be able to leave a legacy to our family and loved ones. However, a recent report* highlighted that over half of people aged 50 or over have no life cover in place whatsoever. If you'd like to provide more for your family, life cover can help you leave a cash lump sum, without the need to sacrifice some of your hard earned pension or savings.

If you'd like to learn more about the options available to you and your family, or indeed discuss any other aspect of your financial future, please get in touch to arrange an appointment. As always, I'm happy to meet at a time and place to suit you.

Yours sincerely

A. Adviser

* Whole of Life Report, Mintel 2014