



Submitted By (Print/Type Name)

Date

MONTHLY CUSTOMER CORRESPONDENCE COVER SHEET

All customer related correspondence must be submitted monthly to your assigned Managing Principal by the 15th of the following month. Please indicate below the names of the representatives included in this submission as well as the total number of Incoming correspondence items submitted and the total number of Outgoing correspondence items submitted. (This form may be used by an individual representative or for a branch office with multiple representatives.)

- Please ensure complete items are submitted, including any attachments that are sent with a cover letter.
- If an item was sent to multiple recipients, please include a distribution list with the item submission. (Items that will be sent to 25 or more recipients within a 30-day window must be submitted to MarketingPro for prior approval)

Submission Type: Individual Representative Office (Name)_____

Managing Principal:	Month / Year:
Representative Name:	Representative Name:
Representative Name:	Representative Name:
Representative Name:	Representative Name:

Number of Incoming Correspondence items attached:	None
Number of Outgoing correspondence items attached:	None