

Retirement Account Statement

Dear [Beneficiary's Name],

We are pleased to provide you with the annual performance review of your retirement account as a designated beneficiary.

Account Summary

Account Number	Account Type	As of [Date]
[Account Number]	[Account Type]	[Current Value]

Investment Performance Overview

Your investment performance for the past year is as follows:

- Starting Balance: [Starting Balance]
- Contributions: [Total Contributions]
- Withdrawals: [Total Withdrawals]
- Ending Balance: [Ending Balance]
- Percentage Growth: [Percentage Growth]

Portfolio Allocation

Your current portfolio allocation is as follows:

- Equities: [Percentage]%
- Fixed Income: [Percentage]%
- Cash/Cash Equivalents: [Percentage]%
- Other Investments: [Percentage]%

Important Notes

Please review the attached documents for details regarding your investments. If you have any questions or require further information, do not hesitate to contact us.

Thank you for entrusting us with your retirement account. We look forward to assisting you further.

Sincerely,

[Your Name]
[Your Title]
[Company Name]
[Contact Information]