

# IRA Plan Evaluation Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

## Subject: IRA Plan Evaluation

Dear [Recipient Name],

I am writing to request a comprehensive evaluation of my IRA plan. As I am considering my financial future, I believe it is important to assess the current performance and suitability of my investment strategy.

Please provide insights on the following:

- Current performance metrics
- Risk assessment
- Fee structure and any potential tax implications
- Recommendations for adjustments or contributions

I appreciate your assistance and expertise in this matter and look forward to your prompt response.

Sincerely,

[Your Name]