

# Tax Shelter Investment Assessment Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient Name]

[Company/Organization Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this message finds you well. I am writing to formally request an assessment of my tax shelter investment pertaining to [specific investment name or type] for the fiscal year [insert year].

As part of my financial planning, I would like to gain a comprehensive understanding of the potential tax benefits and implications associated with this investment. Additionally, I would appreciate any available documentation or insights regarding compliance and reporting requirements.

Thank you for your attention to this matter. I look forward to your prompt response.

Warm regards,

[Your Name]

[Your Title, if applicable]