

Tax Shelter Investment Documentation Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to request documentation regarding my tax shelter investments for the [specific tax year or period, e.g., 2022 tax year]. As part of my annual tax preparation, I require detailed information about my investments so that I can ensure accurate reporting and compliance with tax regulations.

Specifically, I would appreciate the following documents:

- Investment statements and summaries
- Details of any income generated from the investments
- Form 1065 or K-1 if applicable
- Any pertinent correspondence related to the investment

If possible, please send the requested documents to my address listed above or via email at [Your Email Address]. Should you need any further information to fulfill this request, please do not hesitate to reach out to me directly.

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

Sincerely,

[Your Name]