

Tax Shelter Investment Financial Performance Review

Date: [Insert Date]

To: [Investor's Name]

Address: [Investor's Address]

Dear [Investor's Name],

We are pleased to provide you with a financial performance review of your tax shelter investment for the period ended [Insert Period End Date].

Investment Overview

Your total investment in the tax shelter is **\$(Insert Total Investment Amount)**.

Financial Performance

Metric	Value
Total Returns	\$(Insert Total Returns)
Annualized Return	[Insert Annualized Return] %
Net Investment Income	\$(Insert Net Investment Income)

Tax Benefits

You are eligible for tax deductions amounting to **\$(Insert Tax Deductions)** resulting from your investment.

Conclusion

We appreciate your trust in our investment strategies and look forward to continuing to support your financial goals. Should you have any questions or require further information, please do not hesitate to contact us.

Warm regards,

[Your Name]
[Your Position]

[Company Name]
[Contact Information]