

Tax Shelter Investment Statement Inquiry

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this message finds you well. I am writing to inquire about the tax shelter investment statement for my account with [Company Name]. Specifically, I would like to request the following information:

- Details of my current investment status
- Any gains or losses reported for the tax year [Insert Year]
- Documentation necessary for tax filing purposes

Please let me know if you require any further information from my end to facilitate this request. I would appreciate your prompt response as the tax filing deadline is approaching.

Thank you for your assistance.

Sincerely,

[Your Name]