

Investment Policy Statement Compliance Confirmation

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

Dear [Recipient's Name],

We are writing to confirm the compliance of [Client's Name] with the established Investment Policy Statement (IPS) as of [Insert Date].

After a thorough review of the investment activities, we can confirm that all transactions and asset allocations align with the guidelines set forth in the IPS. Specifically:

- Asset Diversification: [Details]
- Risk Tolerance: [Details]
- Investment Objectives: [Details]
- Compliance with Restrictions: [Details]

We will continue to monitor the investment portfolio regularly to ensure ongoing compliance and will notify you promptly of any deviations from the policy.

Thank you for your attention to this matter, and please feel free to reach out should you have any questions or require further information.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]