

# Investment Policy Statement

Date: [Insert Date]

Dear [Client's Name],

We are pleased to present you with our Investment Policy Statement (IPS). This document outlines the key features and guidelines that will govern your investment strategy. Below are the key components of your IPS:

## 1. Investment Objectives

The primary goals of your investment portfolio are:

- Growth of capital
- Income generation
- Risk management

## 2. Risk Tolerance

Your risk tolerance is characterized as [Low/Moderate/High], which shapes the asset allocation and security selection.

## 3. Asset Allocation Strategy

The strategic allocation of your portfolio will be diversified as follows:

- Equities: [Percentage]
- Fixed Income: [Percentage]
- Cash and Cash Equivalents: [Percentage]

## 4. Investment Selection Criteria

Investments will be selected based on [criteria such as performance history, fees, and alignment with goals].

## 5. Review and Rebalancing Policy

Your portfolio will be reviewed [quarterly/annually] and rebalanced to maintain the target asset allocation.

## 6. Reporting

We will provide comprehensive performance reporting on [frequency]. This will include details on returns, asset allocation, and any adjustments made.

Thank you for trusting us with your investments. We are committed to helping you achieve your financial goals.

Sincerely,

[Your Name]

[Your Position]

[Company Name]