

Investment Policy Statement Inquiry

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient Name]

[Recipient Title]

[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 investment policy statement (IPS) that outlines the guidelines and objectives for managing our investment portfolio.

Specifically, I am interested in understanding the following aspects:

- The investment goals and objectives set forth in the IPS
- The asset allocation strategy currently employed
- Any specific constraints or guidelines that govern the investment decisions
- Performance benchmarks used to evaluate outcomes

Understanding these elements will greatly assist in ensuring that our investments align with our overall financial objectives.

I would appreciate it if you could provide a copy of the IPS or direct me to where I might find it. Thank you for your attention to this matter, and I look forward to your prompt response.

Sincerely,

[Your Name]

[Your Title, if applicable]

[Your Company, if applicable]