

Investment Policy Statement

Date: [Insert Date]

To: [Investor's Name]

From: [Your Name/Your Firm's Name]

Subject: Clarification of Investment Objectives

Dear [Investor's Name],

We appreciate your commitment to your investment journey and would like to clarify the objectives outlined in your Investment Policy Statement (IPS). It is essential to ensure that all aspects of your investment strategy are aligned with your financial goals.

Objective 1: Growth

Your primary objective is to achieve long-term capital growth while being cognizant of market fluctuations. This involves a strategic allocation to equities and growth-oriented assets.

Objective 2: Income Generation

Another critical goal is to generate a steady income stream through investments in fixed income securities, dividends, and other yield-generating assets.

Objective 3: Risk Tolerance

Your risk tolerance has been assessed as [Low/Moderate/High], which influences the asset allocation and investment choices made on your behalf.

We encourage a review of these objectives to ensure they reflect your current financial state and future aspirations. Please feel free to reach out with any changes or questions regarding your IPS.

Thank you for your attention to this matter. We look forward to continuing to assist you with your investment strategy.

Sincerely,

[Your Name]

[Your Position]

[Your Firm's Name]

[Contact Information]