

# Investment Policy Statement Performance Review

Date: [Insert Date]

To: [Client's Name]

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

Subject: Performance Review of Investment Policy Statement

Dear [Client's Name],

We are pleased to present you with the performance review of your Investment Policy Statement (IPS) as of [Insert Date]. This review is intended to evaluate the overall performance of your investment portfolio in relation to the objectives outlined in your IPS.

## 1. Portfolio Performance Overview

Your portfolio has achieved a total return of [Insert Percentage]% for the period ending [Insert Date], compared to the benchmark return of [Insert Benchmark Percentage]%.

## 2. Compliance with IPS Guidelines

We have assessed your portfolio's alignment with the guidelines set out in your IPS. The following key areas were reviewed:

- Asset Allocation: [Summary of asset allocation compliance]
- Risk Tolerance: [Evaluation of risk adherence]
- Investment Goals: [Summary of progress towards goals]

## 3. Market Conditions

An analysis of the market conditions over the review period indicates [Brief summary of market trends impacting performance].

## 4. Recommendations

Based on our review, we recommend the following adjustments to optimize your portfolio performance:

- [Recommendation 1]

- [Recommendation 2]
- [Recommendation 3]

Thank you for trusting us with your investment needs. Should you have any questions or require further clarification, please do not hesitate to contact us.

Sincerely,

[Your Name]

[Your Title]

[Your Firm's Name]

[Your Contact Information]