

# Request for Tax Statement for 529 Plan

Date: \_\_\_\_\_

To: [Investment Company Name]

Address: [Investment Company Address]

City, State, Zip: [City, State, Zip]

Dear [Investment Company Contact/Customer Service],

I am writing to formally request the tax statement for my 529 plan investment account for the tax year [insert year]. My account details are as follows:

**Account Holder Name:** [Your Name]

**Account Number:** [Your Account Number]

Please send the requested tax statement to my address listed below or email it to me at [Your Email Address].

**Mailing Address:**

[Your Full Address]

If you require any further information to process this request, please do not hesitate to contact me at [Your Phone Number]. Thank you for your assistance.

Sincerely,

[Your Signature]

[Your Printed Name]