

[Your Company Letterhead]

[Date]

[Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

We are writing to formally request the tax statements associated with our investment accounts held under [Your Company Name or Account Number] for the fiscal year ending [Fiscal Year End Date].

As part of our financial reporting and compliance obligations, it is important that we receive these statements for accurate tax preparation and filing. We would appreciate your assistance in providing the following documents:

- Federal tax documents
- State tax documents
- Any additional transaction summaries

Please send the requested documents to [Your Email Address] or via mail to [Your Mailing Address] at your earliest convenience.

Thank you for your prompt attention to this matter. If you have any questions or require further information, please do not hesitate to contact me at [Your Phone Number] or [Your Email Address].

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Company Phone Number]