

Request for Investment Account Tax Statement

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

[Investment Firm's Name]

[Investment Firm's Address]

[City, State, Zip Code]

Dear [Investment Firm's Name],

My name is [Your Name], and I am an individual investor with the following account details:

Account Number: [Your Account Number]

I am writing to formally request my tax statement for the investment account for the year [Insert Tax Year]. This would greatly assist me in preparing my tax documentation.

If possible, please provide the statement by [Insert Desired Date]. Should you require any further information to process my request, feel free to contact me at [Your Phone Number] or [Your Email Address].

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending hard copy)]

[Your Printed Name]