

Investment Account Tax Statement Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Investment Firm Name]

[Investment Firm Address]

[City, State, Zip Code]

Dear [Investment Firm Representative's Name],

I am writing to request the tax statement for my Individual Retirement Accounts (IRAs) for the year [Insert Year]. My account number(s) is/are [Insert Account Number(s)].

As the tax season approaches, I would appreciate your prompt assistance in providing me with the necessary information regarding my IRAs, including contributions, distributions, and any relevant gains or losses.

Please send the requested tax statements to my mailing address listed above or via email at [Insert Email Address]. If you require any further information or documentation to process my request, feel free to contact me at [Insert Phone Number].

Thank you for your attention to this matter. I look forward to your prompt response.

Sincerely,

[Your Name]