

Investment Account Tax Statement Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

Email: [Your Email]

Phone: [Your Phone Number]

[Recipient Name]

[Recipient Title]

[Company/Financial Institution Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

We are writing to request our investment account tax statements for the year [Insert Year] for our joint account with the account number [Insert Account Number]. As joint account holders, we would like to ensure that we have accurate documentation for tax filing purposes.

Please send the tax statements to our respective email addresses or to our mailing address provided above, whichever you find more suitable. If there are any forms or additional information needed to process our request, please let us know.

Thank you for your assistance in this matter. We look forward to your prompt response.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Name]

[Joint Account Holder's Name]