

Investment Account Tax Statement Request

Date: [Insert Date]

To: [Recipient's Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request the tax statement for my self-directed investment account, account number [Insert Account Number], for the tax year [Insert Tax Year].

As the tax season approaches, I would appreciate your assistance in providing the necessary documentation to ensure I meet my tax obligations accurately and on time.

Thank you for your prompt attention to this matter. Please feel free to contact me at [Your Phone Number] or [Your Email Address] if you require any further information.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]