

Investment Account Tax Statement Request

Date: [Insert Date]

[Your Name]

[Your Title]

[Organization Name]

[Organization Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Financial Institution Name]

[Institution Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to request the investment account tax statement for our organization, [Organization Name], for the tax year [Insert Year]. As a tax-exempt entity under section [Insert Section, e.g., 501(c)(3)], it is important for us to maintain accurate records for compliance and reporting purposes.

We kindly ask for your assistance in providing the tax statement detailing our investment account transactions, including any relevant information we may need for our tax filings.

Thank you for your prompt attention to this request. 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]

[Organization Name]