

Request for Investment Account Tax Statement

Date: [Insert Date]

[Trustee's Name]

[Trust Name]

[Trust Address]

[City, State, Zip Code]

[Financial Institution's Name]

[Department]

[Institution Address]

[City, State, Zip Code]

Dear [Financial Institution's Contact Name],

I am writing to formally request the tax statement for the investment account held under the name of [Trust Name] for the tax year [Insert Year]. As the trustee for the trust, it is essential for me to obtain this documentation to ensure accurate tax reporting and compliance.

Please include all relevant details such as:

- Account number
- Type of investments
- Interest, dividends, and capital gains
- Any other taxable information

Should you need any further information or documentation to process this request, please do not hesitate to contact me at [Your Phone Number] or [Your Email Address]. Thank you for your prompt attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Contact Information]