

Tax-Deferred Capital Gains Distribution Notification

Date: [Insert Date]

To: [Recipient's Name]

Address: [Recipient's Address]

City, State, Zip Code: [Recipient's City, State, Zip Code]

Dear [Recipient's Name],

We are writing to inform you of the tax-deferred capital gains distribution from your investment account with [Company Name]. This notification is important for your records and tax planning purposes.

Capital Gains Distribution Summary:

- Distribution Amount: \$[Amount]
- Distribution Date: [Date]
- Reinvestment Option: [Yes/No]

Please note that this distribution will be reported to the IRS and will affect your tax obligations in the upcoming tax year. We encourage you to consult with your tax advisor regarding the implications of this distribution and any potential tax strategies that may benefit you.

If you have any questions or need further information regarding this distribution, please do not hesitate to contact our office at [Company Phone Number] or [Company Email Address].

Thank you for your continued trust in [Company Name].

Sincerely,

[Your Name]

[Your Title]

[Company Name]

[Company Address]

[Company Phone Number]