

Investment Policy Statement

Date: [Insert Date]

Investor Name: [Insert Investor Name]

Investor Address: [Insert Investor Address]

1. Introduction

This Investment Policy Statement (IPS) outlines the investment goals, strategies, and guidelines for the management of [Investor Name]'s investment portfolio.

2. Investment Objectives

The primary investment objectives are:

- Capital Preservation
- Capital Growth
- Income Generation

3. Risk Tolerance

[Investor Name]'s risk tolerance is classified as [insert risk category: low, moderate, high].

4. Asset Allocation

The target asset allocation is as follows:

- Equities: [Insert Percentage]
- Fixed Income: [Insert Percentage]
- Cash and Equivalents: [Insert Percentage]

5. Investment Strategy

The investment strategy includes [briefly describe the investment strategy, such as active management, passive management, sector focus, etc.].

6. Monitoring and Review

The investment portfolio will be monitored and reviewed [insert frequency: monthly, quarterly, annually].

7. Approval and Amendments

This IPS is approved by [Investor Name] on [Insert Date], and may be amended as necessary. Amendments must be documented in writing.

Signature: _____