

# Investment Policy Statement

Date: [Insert Date]

To: [Institutional Investor Name]

From: [Investment Management Firm Name]

## 1. Introduction

This Investment Policy Statement (IPS) outlines the investment strategy and objectives for [Institutional Investor Name]. It serves as a guideline for managing the investment portfolio and ensuring alignment with the investor's goals.

## 2. Objectives

- Primary Objective: [e.g., Capital appreciation, Income generation]
- Time Horizon: [e.g., Short-term, Medium-term, Long-term]
- Risk Tolerance: [e.g., Conservative, Moderate, Aggressive]

## 3. Investment Strategy

The investment strategy will include the following:

1. Asset Allocation: [e.g., Equities, Fixed Income, Alternatives]
2. Rebalancing Guidelines: [e.g., Frequency and thresholds]

## 4. Performance Monitoring

Performance will be evaluated against [insert benchmarks or indices], and reviews will occur [insert review frequency].

## 5. Reporting

Regular reports will be provided [e.g., quarterly, annually] detailing investment performance and compliance with the IPS.

## 6. Amendments

This IPS may be amended as necessary to reflect changes in investment objectives, market conditions, or other factors.

## 7. Signatures

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[Title of Institutional Investor Representative]

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[Title of Investment Management Firm Representative]