

# Investment Policy Statement

**Date:** [Insert Date]

## Prepared for:

[Client Name]

[Client Address]

[City, State, Zip Code]

## Prepared by:

[Your Name]

[Your Position]

[Your Company]

[Company Address]

[City, State, Zip Code]

## Introduction

This Investment Policy Statement (IPS) outlines the investment strategy and objectives for real estate investments.

## Investment Objectives

- Target Annual Return: [Insert Target Return]
- Investment Horizon: [Insert Investment Horizon]
- Liquidity Requirements: [Insert Liquidity Needs]

## Investment Strategy

Investments will be focused on the following real estate sectors:

- [Sector 1]
- [Sector 2]
- [Sector 3]

## **Risk Tolerance**

The client has a [Insert Risk Tolerance] risk tolerance and is willing to accept [Insert Risk Factors].

## **Investment Constraints**

- Legal Constraints: [Insert Legal Constraints]
- Tax Considerations: [Insert Tax Considerations]

## **Performance Measurement**

Performance will be evaluated on an annual basis against the following benchmarks:

- [Benchmark 1]
- [Benchmark 2]

## **Review and Modification**

This IPS will be reviewed annually and may be modified to reflect changes in investment goals or market conditions.

## **Signatures**

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[Client Name]

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[Your Name]