

[Date]

[Borrower Name]

[Borrower Address]

[City, State, Zip Code]

Re: Commercial Portfolio Asset Quality Review - [Loan/Account Number]

Dear [Contact Person Name],

As part of our standard portfolio management procedures, [Financial Institution Name] is currently conducting its annual Asset Quality Review for your commercial credit facility. This process ensures that all financial information remains current and that the credit structure continues to meet your business needs.

To complete this review, please provide the following updated documentation by [Due Date]:

- Fiscal Year-End Financial Statements for the period ending [Date].
- Current Interim Financial Statements (Balance Sheet and Income Statement).
- Most recent Federal Tax Returns for [Borrower/Guarantor Name].
- Updated Rent Roll and Operating Statement (for real estate assets).
- Current Personal Financial Statement for all Guarantors.
- [Additional Requirement, if any].

Please submit these documents via our secure client portal or by email to [Relationship Manager Email Address].

The timely submission of this information is required to maintain the current status of your credit facility and to ensure compliance with the reporting covenants outlined in your Loan Agreement.

If you have any questions regarding this request, please contact me directly at [Phone Number]. We appreciate your continued business and cooperation.

Sincerely,

[Signature]

[Name of Relationship Manager/Credit Officer]

[Title]

[Financial Institution Name]