

[Financial Institution Name]
[Branch Address]
[City, State, Zip Code]
[Phone Number]

[Date]

[Recipient Name/Organization]
[Recipient Address]
[City, State, Zip Code]

RE: Verification of Investment Assets for [Account Holder Name]

To Whom It May Concern,

This letter serves to formally verify the investment assets held with [Financial Institution Name] by our client, [Account Holder Name].

As of [Date], the following accounts are currently active and in good standing:

- **Account Number:** [Last 4 Digits of Account Number]
- **Account Type:** [e.g., Brokerage, IRA, 401k]
- **Account Open Date:** [Date]
- **Current Market Value:** \$[Amount]
- **Asset Allocation:** [e.g., Stocks, Bonds, Mutual Funds, Cash]

The total aggregate value of the investment portfolio managed by this institution for the aforementioned client is \$[Total Amount].

Please note that the values provided are based on the market closing prices as of [Date] and are subject to market fluctuations. This letter is provided for informational purposes only and does not constitute a guarantee of future value or a lien against these assets.

If you require any further information or additional documentation, please contact our office at [Phone Number] or via email at [Email Address].

Sincerely,

[Signature]
[Authorized Signatory Name]
[Title/Position]
[Financial Institution Name]