

Letter to Stockbroker Requesting Current Value of Portfolio

This package contains:

1. Instructions & Checklist for Writing a Letter to Your Stockbroker Requesting the Current Value of Your Portfolio
2. Letter to Your Stockbroker Requesting the Current Value of Your Portfolio

Instructions & Checklist for a Letter to Your Stockbroker Requesting the Current Value of Your Portfolio

- This package contains: (1) Instructions & Checklist for a Letter to Your Stockbroker Requesting the Current Value of Your Portfolio; and (2) Letter to Your Stockbroker Requesting the Current Value of Your Portfolio.

- This form is designed to assist you in drafting a letter to your stockbroker requesting an analysis of your portfolio and its current value.

- Be sure to include any “enclosures” mentioned in the letter. If there are no “enclosures” you may delete “Enclosure” from the bottom of the letter.

- Be sure to sign the letter and to make a copy before sending it out.

- Bracketed instructions may be included on this form to assist you in completing it and should be removed before printing. Generally in Microsoft Word, you can click on the bracketed instruction and start typing.

- These forms are not intended and are not a substitute for legal advice. These forms should only be a starting point for you and should not be used without consulting with an attorney first. An attorney should be consulted before negotiating any document with another party.

- The purchase and use of these forms, is subject to the Disclaimers and Terms of Use found at findlegalforms.com.

[Your Name]
[Street Address]
[City, State ZIP Code]
[phone number - optional]
[email address - optional]

August 28, 2009

[Name of Recipient]
[Title]
[Company Name]
[Street Address]
[City, State ZIP Code]

Dear [Name of Recipient]:

I'm writing to request your help in a matter of some urgency. Because of certain business negotiations I'm currently involved in, I need to get a picture of my overall financial situation. I'm therefore requesting you prepare a summary of my account – showing all shares I hold, together with their current values.

II know I can trust you to get this report ready with no delay; if you have any questions, please do not hesitate to call.

Thank you very much for your assistance.

Cordially,

[Your Name]

Enclosures