

[Your Name]  
[Your Address]  
[City, State, Zip Code]  
[Email Address]  
[Phone Number]  
[Date]  
[Recipient Name]  
[Recipient Title]  
[Financial Institution Name]  
[Institution Address]  
[City, State, Zip Code]

Dear [Recipient Name],

Subject: Notification of TFSA Investment Strategy

I hope this letter finds you well. I am writing to formally notify you of my investment strategy regarding my Tax-Free Savings Account (TFSA). As of [effective date], I intend to implement the following investment strategy within my TFSA:

1. **\*\*Investment Goals\*\***: [Briefly outline your investment goals, e.g., long-term growth, preservation of capital, etc.]
2. **\*\*Asset Allocation\*\***: [Detail your planned asset allocation, e.g., percentage in equities, fixed income, cash, etc.]
3. **\*\*Investment Vehicles\*\***: [Specify the types of investment vehicles you will use, e.g., stocks, mutual funds, ETFs, bonds, etc.]
4. **\*\*Rebalancing Strategy\*\***: [Describe your approach to rebalancing your portfolio, e.g., frequency and criteria for adjustments.]

I trust that this strategy aligns with my financial objectives and maximizes the benefits of the TFSA. I would appreciate your continued support and guidance as I pursue this investment approach.

Please feel free to contact me at [phone number] or [email address] if you have any questions or require further information.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]  
[Your Printed Name]  
[Your TFSA Account Number] (if applicable)