

[Your Name]
[Your Address]
[City, Province, Postal Code]
[Email Address]
[Phone Number]
[Date]

[Recipient's Name]
[Recipient's Address]
[City, Province, Postal Code]

Dear [Recipient's Name],

Subject: TFSA Investment Review

I hope this letter finds you well. I am writing to provide an overview of your Tax-Free Savings Account (TFSA) investment performance for the period ending [specific date].

1. **Current Account Overview**

- **Account Balance**: \$[current balance]
- **Initial Investment**: \$[initial amount]
- **Total Contributions**: \$[total contributions]
- **Total Withdrawals**: \$[total withdrawals]

2. **Investment Performance**

- **Investment Type**: [e.g., Stocks, Bonds, Mutual Funds]
- **Return on Investment (ROI)**: [percentage]
- **Market Comparison**: [comparison to relevant index or benchmark]

3. **Asset Allocation**

- **Equities**: [percentage]
- **Fixed Income**: [percentage]
- **Cash & Cash Equivalents**: [percentage]
- **Alternatives**: [percentage]

4. **Recommendations**

- [Brief summary of recommendations or changes to consider]

5. **Conclusion**

Your TFSA has shown [positive/negative/stable] performance over the reporting period. As we move forward, it may be beneficial to [suggestion or next steps].

Please feel free to reach out if you have any questions or if you would like to discuss your investments further.

Sincerely,

[Your Name]

[Your Title / Company Name]