Mutual Fund Letter of Intent

John Doe
123 Main Street
Springfield, IL 62704
March 4, 2024

Emily Johnson
Fund Manager
Investment Solutions Inc.
456 Finance Avenue
New York, NY 10005

Dear Ms. Johnson,

I am writing to express my intent to invest in the mutual funds offered by Investment Solutions Inc. Over the past few months, I have thoroughly researched various investment options and have been particularly impressed by the consistent performance and the strategic approach of your funds.

I am particularly interested in the Balanced Growth Fund and the Equity Income Fund, given my investment goals and risk tolerance. My intent is to allocate an initial sum of $50,000, with a plan to increase my investment to $100,000 over the next twelve months. This phased investment approach aligns with my financial planning and commitment to diversifying my portfolio.

I understand that Investment Solutions Inc. offers certain incentives and reduced fees for investors who commit to a minimum investment amount within a specific period. I would like to inquire about the possibility of qualifying for these benefits under a Letter of Intent. I believe that this arrangement can be mutually beneficial, allowing me to fully commit to my investment strategy while taking advantage of the incentives you offer.

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Please advise on the steps required to formalize this intent and any documentation that I need to provide. I am keen to proceed as soon as possible and look forward to establishing a fruitful investment relationship with Investment Solutions Inc.

Thank you for considering my investment intent. I am eager to contribute to and benefit from the success of your mutual funds. Please feel free to contact me at your earliest convenience to discuss the next steps.

Yours sincerely,

John Doe

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