

Personal Investment Statement

Personal Information

Name

Date

Report Period

Investment Objectives

Investment Assets

Type	Institution	Account Number	Value
<input type="text" value="e.g. Stocks"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="e.g. \$10,000"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Liabilities

Type	Institution	Account Number	Balance Owed
<input type="text" value="e.g. Margin Loan"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="e.g. \$2,000"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Net Worth Summary

Total Assets

Total Liabilities

Net Worth

Notes / Comments