

Personal Investment Statement

Personal Information

Name

Date

Report Period

e.g. Jan 2024 - Jun 2024

Investment Objectives

Investment Assets

Type	Institution	Account Number	Value
e.g. Stocks			e.g. \$10,000

Liabilities

Type	Institution	Account Number	Balance Owed
e.g. Margin Loan			e.g. \$2,000

Net Worth Summary

Total Assets

Total Liabilities

Net Worth

Notes / Comments