

Investment Statement Form

This **investment statement form** sample provides a clear overview of capital gains earned from various financial assets. It helps investors accurately report their earnings for tax and record-keeping purposes. The form ensures transparency and compliance with regulatory requirements.

Investor Name: _____

Account Number: _____

Statement Period: _____ / _____ / _____ to _____ / _____ / _____

Date of Transaction	Asset Description	Type	Purchase Price (\$)	Sale Price (\$)	Capital Gain/Loss (\$)
03/15/2024	Apple Inc. (AAPL)	Stock	10,000	13,000	3,000
04/24/2024	US Treasury Bond 2032	Bond	5,000	5,300	300
05/02/2024	ABC Growth Fund	Mutual Fund	7,200	7,500	300
06/12/2024	Tesla Inc. (TSLA)	Stock	8,100	7,800	-300

Total Capital Gains/Losses: \$3,300

Prepared by: _____

Date: _____ / _____ / _____

This is a sample investment statement form. Values are for illustration purposes only.