

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.