

Investment Statement Form - Real Estate Investments

This **investment statement form** sample is designed specifically for real estate investments, providing a clear overview of assets, liabilities, and financial performance. It helps investors track property values, rental income, and expenses efficiently. Using this standardized form ensures accurate and organized financial documentation for real estate portfolios.

1. Investor Information

Investor Name		Statement Date	
Contact		Portfolio ID/Ref	

2. Real Estate Asset Details

Property Name/Address	Type	Acquisition Date	Acquisition Value	Current Market Value

3. Rental Income Summary

Property	Monthly Rental Income	Annual Rental Income

4. Expenses

Property	Expense Type	Amount	Date

5. Liabilities

Property	Loan/Lender	Outstanding Amount	Interest Rate	Repayment Term

6. Financial Performance Summary

Total Asset Value		
Total Liabilities		
Net Equity		
Annual Rental Income		
Total Expenses		
Net Income		

7. Signatures

Prepared By		Date	
Reviewed By		Date	