

# Simple Statement of Account Form

This **simple statement of account form** sample is designed specifically for small businesses to efficiently track customer transactions and outstanding balances. It provides a clear and concise summary of invoices, payments, and credit notes, making financial management straightforward. Using this form helps ensure accurate record-keeping and enhances communication with clients.

<b>Business Name:</b>	[Your Business Name]	<b>Date:</b>	[Statement Date]
<b>Customer Name:</b>	[Customer Name]	<b>Account Number:</b>	[Customer Account #]

## Statement of Account

Date	Description	Reference / Invoice #	Debit (Amount)	Credit (Amount)	Balance
2024-06-01	Invoice Issued	INV-1023	\$1,000.00		\$1,000.00
2024-06-05	Payment Received	PAY-2008		\$500.00	\$500.00
2024-06-10	Credit Note	CN-301		\$100.00	\$400.00
2024-06-20	Invoice Issued	INV-1030	\$250.00		\$650.00

**Total Debits:** \$1,250.00

**Total Credits:** \$600.00

**Outstanding Balance:** \$650.00

*Please contact us if you have any questions regarding this statement. Thank you for your business!*