

SET YOUR HOUSE IN ORDER

LIST OF INVESTMENTS - STOCKS

Stocks, Bonds, Mutual Funds, and Other Securities

If you have brokerage account, attach the monthly statement to the "Investment List." If you own stocks, bonds, mutual funds, or other securities not a part of your brokerage account, complete the information under the appropriate heading below.

STOCKS

Description of Stock: _____
Number of Shares: _____ Purchase Price: _____
Where Held: _____ Date Acquired: _____
Online / Other Info: _____ Dividend Info: _____
Other: _____

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Number of Shares: _____ Purchase Price: _____
Where Held: _____ Date Acquired: _____
Online / Other Info: _____ Dividend Info: _____
Other: _____

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