

# PORTFOLIO PERFORMANCE LOG

FISCAL YEAR: 20\_\_\_\_  
ACCOUNT NAME \_\_\_\_\_  
STARTING BALANCE \_\_\_\_\_  
TARGET RETURN % \_\_\_\_\_

| Date | Ticker/Asset | Cost Basis | Sell Price | Net Gain \$ | ROI % |
|------|--------------|------------|------------|-------------|-------|
|------|--------------|------------|------------|-------------|-------|

Total Period Gains:

STRATEGY NOTES & REFLECTIONS