



**Virtual Portfolio Manager**

**Mission Statement**

**Style Statement**

**Weekly Review/Order sheets**

## **Portfolio Tracking and Review**

**Portfolio Name** \_\_\_\_\_

**Inception date** \_\_\_\_\_

**Manager** \_\_\_\_\_

**Monthly Review**

**Quarterly Review**

**Annual Review**

**Portfolio Summary**

**Stock Activations and Deletions**

**Miscellaneous Notes**