

WHAT IT IS

AsciiStatement is a fully managed financial record service that consolidates every bank account, brokerage, retirement account, mortgage, and business ledger into a single permanent record — privately hosted, always exportable, and owned entirely by the client. No SaaS dependency. No data retention risk. No lock-in.

THE PROBLEM IT SOLVES

- Financial data is scattered across institutions with inconsistent data retention policies.
- When mortgages are sold and portals close, historical records disappear permanently.
- No single institution can show a client their complete financial picture across all accounts.
- Most financial tools are SaaS products — data is held hostage behind subscriptions.

WHAT IS INCLUDED

Executive Summary

Net worth, projected worth, real estate, and business P&L in one consolidated view.

Statement Archive

Every statement, every year, every institution — permanently stored.

PDF Index Search

Every statement PDF fully indexed and searchable across all years and accounts.

Brokerage Explorer

Full transaction ledger with portfolio metrics across all investment accounts.

Business Ledger

Business P&L integrated directly into your personal balance sheet.

Custom Integrations

New institutions and explorers added on request. If there's source data, we build it.

WHO IT IS FOR

High Net Worth Individuals

Whose financial life spans multiple institutions, decades of history, and assets no single portal can show whole.

Small Business Owners

Who need personal and business finances unified in one permanent record without trusting a SaaS platform.

Financial Professionals

CPAs, estate attorneys, and financial planners seeking a permanent, independently verified financial record for their clients.

PROFESSIONAL SERVICE

AsciiStatement is offered as a professional service with a simple flat monthly rate — one rate, everything included, no tiers or add-ons. Engagements are scoped individually. Contact us to begin a conversation.

AsciiStatement provides financial record management and data aggregation services. Reports and documents are provided for informational purposes only and do not constitute professional accounting, auditing, tax, legal, or financial advice. AsciiStatement is not a licensed accounting or financial advisory firm.