

Personal Financial Assessment Form Sample for Individuals

A **personal financial assessment form** sample for individuals helps evaluate income, expenses, assets, and liabilities to provide a clear picture of one's financial health. This form is essential for budgeting, debt management, and financial planning. Using a structured format ensures accurate and comprehensive financial analysis.

Personal Information

Full Name:	<input type="text"/>
Date of Birth:	<input type="text"/>
Contact Number:	<input type="text"/>
Email:	<input type="text"/>

Income

Source of Income	Monthly Amount (\$)
Salary/Wages	<input type="text"/>
Business/Side Income	<input type="text"/>
Investment Income	<input type="text"/>
Other (Specify)	<input type="text"/>
Total Monthly Income	<input type="text"/>

Expenses

Expense Category	Monthly Amount (\$)
Housing (Rent/Mortgage)	<input type="text"/>
Utilities	<input type="text"/>
Transportation	<input type="text"/>
Groceries	<input type="text"/>
Insurance	<input type="text"/>
Personal/Medical	<input type="text"/>
Debt Payments	<input type="text"/>
Other (Specify)	<input type="text"/>
Total Monthly Expenses	<input type="text"/>

Assets

Asset Type	Value (\$)
Cash/Savings	<input type="text"/>
Investments (Stocks, Bonds, etc.)	<input type="text"/>

Home/Property	<input type="text"/>
Vehicle(s)	<input type="text"/>
Other (Specify)	<input type="text"/>
Total Assets	<input type="text"/>

Liabilities

Liability Type	Outstanding Balance (\$)
Mortgage	<input type="text"/>
Car Loan	<input type="text"/>
Credit Card Debt	<input type="text"/>
Personal Loans	<input type="text"/>
Other (Specify)	<input type="text"/>
Total Liabilities	<input type="text"/>

Summary

Net Monthly Cash Flow (Total Income - Total Expenses):	<input type="text"/>
Net Worth (Total Assets - Total Liabilities):	<input type="text"/>

Note: This form is a sample and should be tailored to your specific circumstances for accurate financial planning.

Submit