

Personal Financial Statement Excel Template for Loan Application

Use this **personal financial statement excel template** to efficiently organize your financial information for loan applications. It helps present assets, liabilities, and net worth clearly, enhancing your chances of approval. Simplify your loan process with this user-friendly and accurate template.

Sample Personal Financial Statement

Personal Information	
Name	
Address	
Phone	
Email	

Assets	
Cash and Bank Accounts	
Investments (Stocks, Bonds, etc.)	
Real Estate	
Vehicles	
Other Assets	
Total Assets	

Liabilities	
Credit Card Debt	
Loans (Personal, Auto, etc.)	
Mortgage(s)	
Other Liabilities	
Total Liabilities	

Net Worth Calculation	Amount
Total Assets	
Minus Total Liabilities	
Net Worth	

After filling in this template, you can save and attach it to your loan application to provide a precise overview of your financial position.

*Tip: For automated calculations and easy updates, download the **personal financial statement excel template** and use it in Microsoft Excel or Google Sheets.*