

Simple Personal Financial Statement

This **personal financial statement** template is designed for individuals seeking a straightforward way to document their assets, liabilities, and net worth. It helps users gain a clear overview of their financial health by organizing important information in a simple format. Ideal for personal budgeting and financial planning, this template ensures easy tracking and management of finances.

Personal Information

Name:	
Date:	

Assets

	Asset Type	Amount
Cash & Checking Accounts		
Savings Accounts		
Investments (Stocks, Bonds, Mutual Funds)		
Retirement Accounts		
Real Estate (Market Value)		
Vehicles		
Other Assets		
Total Assets		

Liabilities

	Liability Type	Amount
Credit Card Debt		
Mortgage		
Car Loans		
Student Loans		
Other Liabilities		
Total Liabilities		

Net Worth

Total Assets	
Minus: Total Liabilities	
Net Worth	

Tip: Fill in all amounts. Use this statement regularly to monitor changes and make informed financial decisions.