

Personal Financial Statement Form Example in Excel

Download our **Personal Financial Statement form example** in Excel to easily organize and track your assets, liabilities, income, and expenses. This template simplifies financial analysis, helping you assess your financial health with accuracy. Ideal for personal use or loan applications, it provides a clear overview of your financial status.

Personal Information	
Full Name:	
Address:	
Phone Number:	
Email:	

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

LIABILITIES	
Credit Card Debt	
Mortgage	
Car Loan	
Student Loans	
Other Liabilities	
Total Liabilities	

INCOME	
Salary/Wages	
Investment Income	
Other Income	
Total Income	

EXPENSES	
Housing	
Utilities	
Food & Groceries	

Transportation	
Other Expenses	
Total Expenses	

Net Worth (Total Assets - Total Liabilities)	
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