

Statement of Assets and Liabilities Form Sample

The **Statement of Assets and Liabilities Form** sample provides a clear template to accurately list personal or business assets and liabilities. It assists in the comprehensive calculation of net worth, offering valuable insight into financial health. This form is essential for budgeting, loan applications, and financial planning.

Personal Information

Full Name:	John Doe	Date:	2024-06-05
Address:	123 Main Street, City, Country		

Assets

Type of Asset	Description	Current Value (USD)
Liquid Assets		
Cash	Checking & Savings Accounts	8,500
Investments	Stocks, Bonds, Mutual Funds	32,000
Fixed Assets		
Real Estate	Primary Residence	250,000
Vehicle	2022 Sedan	15,000
Other	Jewelry	5,000
Total Assets		310,500

Liabilities

Type of Liability	Description	Outstanding Balance (USD)
Mortgage Loan	Home Mortgage	190,000
Auto Loan	Vehicle Loan	5,800
Credit Card Debt	Visa, MasterCard	4,200
Personal Loan	Bank Loan	3,000
Total Liabilities		203,000

Net Worth Calculation

Total Assets	310,500
Total Liabilities	203,000
Net Worth (Assets - Liabilities)	107,500

Note: This is a sample template. Replace the sample data with your own information for accurate financial planning. The net worth calculation is a snapshot in time and should be updated regularly.