

Personal Financial Statement Excel Template

Use this **personal financial statement Excel template** to effortlessly track your assets, liabilities, and net worth. Featuring automated calculations, it simplifies financial analysis and helps you maintain accurate records. Ideal for personal budgeting and financial planning needs.

Template Features

- Easy-to-use interface for entering financial data
- Automated calculations for totals and net worth
- Separate sections for **Assets** and **Liabilities**
- Built-in summary and financial analysis charts
- Fully customizable to match your unique financial situation

How to Use

1. Download and open the Excel template.
2. Enter your information in the asset categories (cash, investments, property, etc.).
3. Fill out your current liabilities (loans, credit cards, other debts).
4. The template will automatically calculate your total assets, total liabilities, and net worth.
5. Review the charts and summary section for a quick financial overview.

Sample Table Structure

Category	Description	Amount (USD)
Assets	Cash & Savings	=SUM(B2:B10)
	Investments	=SUM(B11:B20)
	Real Estate	=B21
Liabilities	Loans	=SUM(B23:B25)
	Credit Cards	=B26
	Other Debts	=B27
Net Worth		=SUM(Assets) - SUM(Liabilities)

Download

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