

Personal Financial Statement Excel Template for Mortgage Application

Use this **personal financial statement Excel template** to organize your assets, liabilities, and income clearly for a mortgage application. It simplifies the process by providing a structured format to present your financial health. This template ensures accurate and professional documentation, increasing your chances of mortgage approval.

Sample Financial Statement Table

Assets		Liabilities	
Checking Account	\$10,000	Mortgage Balance	\$150,000
Savings Account	\$5,000	Car Loan	\$12,000
Investments	\$20,000	Credit Card Debt	\$2,000
Real Estate	\$200,000	Other Liabilities	\$5,000
Total Assets	\$235,000	Total Liabilities	\$169,000
Net Worth	\$66,000		

Income And Expenses Overview

Description	Monthly Amount
Salary (Net)	\$5,000
Other Income	\$500
Monthly Expenses	(\$3,200)
Total Net Monthly Income	\$2,300

Download and customize this Excel template to provide accurate, up-to-date figures as needed for your mortgage application.