

# Personal Financial Statement Form Sample PDF

A **personal financial statement form sample PDF** provides a structured template to document individual assets, liabilities, income, and expenses. This form is essential for financial planning, loan applications, and budgeting. It ensures clarity and accuracy in presenting your financial status.

## Sample Personal Financial Statement Form

Personal Information	
Full Name:	_____
Address:	_____
Phone Number:	_____
Date of Birth:	_____

Assets	
Cash & Savings Accounts	\$ _____
Investments (Stocks, Bonds, etc.)	\$ _____
Real Estate	\$ _____
Automobiles	\$ _____
Other Assets	\$ _____
<b>Total Assets</b>	\$ _____

Liabilities	
Loans Payable	\$ _____
Credit Card Debt	\$ _____
Mortgage	\$ _____
Other Liabilities	\$ _____
<b>Total Liabilities</b>	\$ _____

Income	Amount
Salary/Wages	\$ _____
Business Income	\$ _____
Investment Income	\$ _____
Other Income	\$ _____
<b>Total Monthly Income</b>	\$ _____

Expenses	Amount
Housing	\$ _____
Utilities	\$ _____

Transportation	\$ _____
Groceries	\$ _____
Insurance	\$ _____
Other Expenses	\$ _____
<b>Total Monthly Expenses</b>	<b>\$ _____</b>

## Net Worth Calculation

**Net Worth = Total Assets - Total Liabilities**

Net Worth: \$ \_\_\_\_\_

I hereby certify that the above information is true and correct to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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