

Personal Balance Statement Form Template Excel

Use this **Personal Balance Statement Form Template Excel** to efficiently track your assets and liabilities. This template helps you maintain a clear overview of your financial status, ensuring accurate personal budgeting and financial planning. Its user-friendly Excel format allows easy customization and instant calculations.

Sample Personal Balance Statement Form

Category	Description	Amount
Assets		
Cash & Checking Accounts	Balances in checking/savings accounts	<input type="text" value="0.00"/>
Investments	Stocks, bonds, mutual funds	<input type="text" value="0.00"/>
Real Estate	Estimated value of properties owned	<input type="text" value="0.00"/>
Vehicles	Current value of cars, boats, etc.	<input type="text" value="0.00"/>
Other Assets	Personal property, valuables	<input type="text" value="0.00"/>
Total Assets		<input type="text" value="0.00"/>
Liabilities		
Mortgage	Current mortgage balance	<input type="text" value="0.00"/>
Credit Cards	Total credit card debt	<input type="text" value="0.00"/>
Student Loans	Outstanding student loan balance	<input type="text" value="0.00"/>
Car Loans	Outstanding auto loan balances	<input type="text" value="0.00"/>
Other Liabilities	Personal loans, medical bills, etc.	<input type="text" value="0.00"/>
Total Liabilities		<input type="text" value="0.00"/>
Net Worth (Assets - Liabilities)		<input type="text" value="0.00"/>

Download this template: [Personal Balance Statement Template.xlsx](#)