**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12326&utm_source=template-word&utm_medium=content&utm_campaign=Personal+Financial+Statement-word-12326&lpa=Personal+Financial+Statement+word+12326)Microsoft Word   
Personal Financial Statement Template**

|  |  |
| --- | --- |
| **Name** |  |
| **Address** |  |
| **Date Prepared** | MM/DD/YY |

|  |  |  |
| --- | --- | --- |
| Assets | 20XX | 20XX |
| **Current Assets** |  |  |
| Cash | $11,874.00 | 0 |
| Accounts Receivable | 0 | 0 |
| Inventory | 0 | 0 |
| Prepaid Expenses | 0 | 0 |
| Short-Term Investments | 0 | 0 |
| **Total Current Assets** | **$11,874.00** | **0** |
|  | | |
| **Fixed (Long-Term) Assets** |  |  |
| Long-term Investments | $1,208.00 | 0 |
| Property and Equipment | $15,340.00 | 0 |
| (Less Accumulated Depreciation) | $ (2,200.00) | 0 |
| Intangible Assets | 0 | 0 |
| **Total Fixed Assets** | **$14,348.00** | **0** |
|  | | |
| **Other Assets** |  |  |
| Deferred Income Tax | 0 | 0 |
| Investments (stocks, bonds, mutual funds) |  |  |
| Real Estate |  |  |
| Notes and Contracts Held |  |  |
| Other | 0 | 0 |
| Other | 0 | 0 |
| **Total Other Assets** | **0** | **0** |
|  | | |
| Total Assets | **$26,195** | **0** |

|  |  |  |
| --- | --- | --- |
| Liabilities | 20XX | 20XX |
| **Current Liabilities** |  |  |
| Accounts Payable | $8,060.00 | 0 |
| Short-Term Loans | 0 | 0 |
| Income Taxes Payable | $3,145.00 | 0 |
| Accrued Salaries and Wages | 0 | 0 |
| Unearned Revenue | 0 | 0 |
| Current Portion of Long-Term Debt | 0 | 0 |
| **Total Current Liabilities** | **$11,205.00** | **0** |
|  | | |
| **Long-Term Liabilities** |  |  |
| Long-Term Debt | $3,450.00 | 0 |
| Deferred Income Tax | 0 | 0 |
| Short-Term Debt / Credit Card Debt | 0 | 0 |
| **Total Long-Term Liabilities** | **$3,450.00** | **0** |
|  | | |
| Total Liabilities | **$14,655** | **0** |

|  |  |  |
| --- | --- | --- |
| Net Worth | 20XX | 20XX |
| **Total Net** | **$11,540.00** | **0** |

|  |
| --- |
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