

Comprehensive Financial Statement Planner

Personal Information

Full Name

Date

Statement Period

e.g. Jan 2024 - Dec 2024

Income

Source	Amount	Frequency
e.g. Salary	<input type="text"/>	Monthly <input type="button" value="▼"/>
<input type="text"/>	<input type="text"/>	Monthly <input type="button" value="▼"/>

Expenses

Category	Amount	Frequency
e.g. Rent	<input type="text"/>	Monthly <input type="button" value="▼"/>
<input type="text"/>	<input type="text"/>	Monthly <input type="button" value="▼"/>

Assets

Asset Type	Description	Value
e.g. Savings Account	Bank XYZ	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Liabilities

Liability Type	Description	Balance
<input type="text"/>	<input type="text"/>	<input type="text"/>

Liability Type	Description	Balance
e.g. Credit Card	Bank ABC	

Notes & Assumptions

Enter any relevant notes or financial planning assumptions...