

INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT

Client's Name: _____ Date: _____

General Instructions

Accurate information concerning property and debts is very important in divorce cases. Please fill out the attached form as completely as you can, drawing on any source of information to which you have access. Do not enlist your spouse's help unless I specifically permit it. **DO NOT LET ANYONE SEE THIS DOCUMENT. THIS PREPARATION OF YOUR INVENTORY AND APPRAISEMENT IS A CONFIDENTIAL MATTER BETWEEN YOU AND YOUR ATTORNEY.** Be cautious: you and your spouse are now legal adversaries, and you should verify all information on your own. When it comes to questions of the present value of property, you should make your own independent estimate.

The attached form provides for only a few items under each type of property. If you need to provide additional information, photocopy an extra page or use a separate piece of paper and number the information as it is numbered in the inventory. If you do not know the answer to an item, do not leave it blank; write "I don't know."

The task will not be easy. Do not expect to complete the form at one sitting. Be assured, however, that your effort is necessary and worthwhile.

Property Division

In addition to factual data, I need to know your wishes about division of the property. Please indicate your wishes in the left margin of the form by placing a "W" next to items you want to go to the wife and an "H" next to the items you want to go to the husband.

Definitions

Separate Property – Property acquired by a spouse before marriage and property a spouse acquired individually during marriage by gift or inheritance or as a result of personal injury are considered to be separate property of that spouse. If either you or your spouse has any property you think is separate property, complete the section marked "Separate Estate of the Parties."

Community Property – All property that is not separate property is community property.

Fair Market Value – A generally accepted definition of fair market value is the price at which the asset would change hands between a willing seller, under no compulsion to sell, and a willing buyer, under no compulsion to buy, with both parties having reasonable knowledge of the relevant facts. Use this value whenever possible. If an asset has no fair market value, state the actual value of the asset to you considering its present condition.

Copies of Documents to Be Returned

If an asset has a statement of account, return a copy of the current statement of account with this Preparation of Inventory and Appraisalment. If an asset has a title document (deed, deed of trust certificate of title to motor vehicle), return a copy with this Preparation of Inventory and Appraisalment. If an asset has any document that can clearly identify it, return a copy with the Preparation of Inventory and Appraisalment.

Here is a checklist of some of the copies of items you should return with this Preparation of Inventory and Appraisalment:

1. financial institution statements;
2. bank statements;
3. annuity statements;
4. IRA statements;
5. SEP statements;
6. certificate of deposit statements;
7. retirements benefits statements of account;
8. life insurance policies and premium notices;
9. broker statements;
10. deeds;
11. deeds of trust;
12. mortgage company payment coupon books (usually one page is enough);
13. certificates of title to motor vehicles;
14. stocks;
15. last statement from each creditor, including credit card statements;
16. appraisals;
17. any other documents that may lead to the discovery of assets or liabilities.

Full Disclosure

Finally, I will rely on this Preparation of Inventory and Appraisalment in the case. If you omit any asset, the court could set it aside to your new spouse now or at a later date. If you omit a liability, you may be solely responsible for it. By your signature below, you verify to me that these are all the assets and liabilities of community and separate property of which you have knowledge.

Verification

“I have read these instructions and I state that all the community- and separate property assets and liabilities are fully disclosed on the attached Preparation of Inventory and Appraisalment of [client’s full name].”

Signature

Date

CLIENT QUESTIONNAIRE FOR INVENTORY AND APPRAISEMENT

Community Estate of the Parties

1. **Real Property.** Include any property purchased by contract for deed, such as Texas Veterans Land Board property, property purchased in recreational developments, and timeshares.

a. Street Address: _____

County of Location: _____

Description of Improvements, If Any: _____

Legal Description: _____

Current Fair Market Value (as of _____): \$ _____

Name of Mortgage Company and Account Number, If Any: _____

Current Balance of Mortgage (as of _____): \$ _____

Other Liens Against Property: _____

Current Net Equity in Property: \$ _____

b. Street Address: _____

County of Location: _____

Description of Improvements, If Any: _____

Legal Description: _____

Current Fair Market Value (as of _____): \$ _____

Name of Mortgage Company and Account Number, If Any: _____

Current Balance of Mortgage (as of _____): \$ _____

Other Liens Against Property: _____

Current Net Equity in Property: \$ _____

c. Street Address: _____

County of Location: _____

Description of Improvements, If Any: _____

Legal Description: _____

Current Fair Market Value (as of _____): \$ _____

Name of Mortgage Company and Account Number, If Any: _____

Current Balance of Mortgage (as of _____): \$ _____

Other Liens Against Property: _____

Current Net Equity in Property: \$ _____

2. **Mineral Interests.** Include any property in which the parties own the mineral estate, separate and apart from the surface estate, such as oil and gas leases; also include royalty interests, working interests, and producing and nonproducing oil and gas wells.

a. Name of mineral interest/lease/well: _____

Type of Interest: _____

County of Location: _____

Legal Description: _____

Name of Producer/Operator: _____

Current Value (as of _____): \$ _____

b. Name of mineral interest/lease/well: _____

Type of Interest: _____

County of Location: _____

Legal Description: _____

Name of Producer/Operator: _____

Current Value (as of _____): \$ _____

c. Name of mineral interest/lease/well: _____

Type of Interest: _____

County of Location: _____

Legal Description: _____

Name of Producer/Operator: _____

Current Value (as of _____): \$ _____

3. **Cash and Accounts with Financial Institutions.** Include cash, traveler's checks, money orders, and accounts with commercial banks, savings banks, credit unions, and funds on deposit with attorneys and other third parties; exclude accounts with brokerage houses and all retirement accounts.

a. Cash on Hand: \$ _____

b. Traveler's Checks: \$ _____

c. Money Orders: \$ _____

d. Margin Loan Balance (as of _____) \$ _____

e. Name of Financial Institution: _____

Account Name: _____

Account Number: _____

Type of Account: (checking/savings/money market/certificate of deposit) _____

Name(s) on Withdrawal Cards: _____

Current Balance (as of _____): \$ _____

f. Name of Financial Institution: _____

Account Name: _____

Account Number: _____

Type of Account: (checking/savings/money market/certificate of deposit) _____

Name(s) on Withdrawal Cards: _____

Current Balance (as of _____): \$ _____

- g. Name of Financial Institution: _____
Account Name: _____
Account Number: _____
Type of Account: (checking/savings/money market/certificate of deposit) _____
Name(s) on Withdrawal Cards: _____
Current Balance (as of _____): \$ _____

4. Brokerage/Mutual Fund Accounts

- a. Name of Brokerage Firm/Mutual Fund: _____
Address of Brokerage Firm/Mutual Fund: _____

Name Account Held In: _____
Name of Account (and Subaccounts if any): _____

Account number (and numbers of subaccounts if any): _____

Margin loan balance (as of _____): _____
Value of community interest in each account (and subaccounts if any) (as of _____):

- b. Name of Brokerage Firm/Mutual Fund: _____
Address of Brokerage Firm/Mutual Fund: _____

Name Account Held In: _____
Name of Account (and Subaccounts if any): _____

Account number (and numbers of subaccounts if any): _____

Margin loan balance (as of _____): _____
Value of community interest in each account (and subaccounts if any) (as of _____):

c. Name of Brokerage Firm/Mutual Fund: _____
 Address of Brokerage Firm/Mutual Fund: _____

 Name Account Held In: _____
 Name of Account (and Subaccounts if any): _____

 Account number (and numbers of subaccounts if any): _____

 Margin loan balance (as of _____): _____
 Value of community interest in each account (and subaccounts if any) (as of _____): _____

5. **Publicly Traded Stocks, Bonds, and Other Securities.** Include securities not in a brokerage account, mutual fund, or retirement fund.

a. Name of Security: _____
 Number of Shares: _____
 Type of Security (common stock/preferred stock/bond/other security): _____
 Certificate Numbers: _____
 In Possession Of: _____
 Name of Exchange on Which Listed: _____
 Pledged as collateral? (Yes or No): _____
 Current Market Value (as of _____): \$ _____
 Value of Community Interests (as of _____): \$ _____

b. Name of Security: _____
 Number of Shares: _____
 Type of Security (common stock/preferred stock/bond/other security): _____
 Certificate Numbers: _____
 In Possession Of: _____
 Name of Exchange on Which Listed: _____
 Pledged as collateral? (Yes or No): _____
 Current Market Value (as of _____): \$ _____
 Value of Community Interests (as of _____): \$ _____

6. **Stock Options.** Include all exercisable, non-exercisable, vested and non-vested stock options regardless of any restrictions on transfer.

a. Name of Company: _____
Date of Option/Grant: _____
Vesting Schedule: _____
Number of Options: _____
Are the Options Exercisable? (Yes or No): _____
Are the Options Registered? (Yes or No): _____
Current Stock Price: \$ _____
Strike Price: \$ _____
Current Net Market Value (as of _____): \$ _____
Value of Community Interest (as of _____): \$ _____

b. Name of Company: _____
Date of Option/Grant: _____
Vesting Schedule: _____
Number of Options: _____
Are the Options Exercisable? (Yes or No): _____
Are the Options Registered? (Yes or No): _____
Current Stock Price: \$ _____
Strike Price: \$ _____
Current Net Market Value (as of _____): \$ _____
Value of Community Interest (as of _____): \$ _____

7. **Bonuses.**

a. Name of Company: _____
Date Bonus Expected to be Paid: _____
Anticipated Amount of Bonus: \$ _____

b. Name of Company: _____
Date Bonus Expected to be Paid: _____
Anticipated Amount of Bonus: \$ _____

8. **Closely Held Business Interests.** Include sole proprietorships, professional practices, corporations, partnerships, limited liability companies and partnerships, joint ventures, and other non-publicly traded business entities.

- a. Name of Business: _____
Address: _____
Type of Business Organization: _____
Percentage of Ownership: _____
Number of Shares Owned (if applicable): _____
Value (as of _____): \$ _____
Balance of Accounts Receivable if on Cash Accounting Basis: \$ _____
Balance of Liabilities if on Cash Accounting Basis: \$ _____

9. **Retirement Benefits.**

a. **Defined Contribution Plans.** This is a plan that provides for an individual account for a participant and for benefits based solely on the amount contributed to the participant's account; IRC §§ 401(k), 403(b).

- i. Exact Name of Plan: _____
Name and Address of Plan Administrator: _____
Employee: _____
Employer: _____
Starting Date of Creditable Service: _____
Percentage Employee is Vested: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Current Account Balance (as of _____): \$ _____
Balance of Loan Against Plan: \$ _____
Value of Community Interest in Plan (as of _____): \$ _____

- ii. Exact Name of Plan: _____
Name and Address of Plan Administrator: _____

Employee: _____
Employer: _____
Starting Date of Creditable Service: _____
Percentage Employee is Vested: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Current Account Balance (as of _____): \$ _____
Balance of Loan Against Plan: \$ _____
Value of Community Interest in Plan (as of _____): \$ _____

b. **Defined Benefit Plan.** This is any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula.

i. Exact Name of Plan: _____
Name and Address of Plan Administrator: _____
Employee: _____
Employer: _____
Starting Date of Creditable Service: _____
Percentage Employee is Vested: _____
Designated Beneficiary: _____
Payee of Survivor Benefits: _____
Description of Benefits: _____
Value of Community Interest in Plan (as of _____): \$ _____

ii. Exact Name of Plan: _____
Name and Address of Plan Administrator: _____
Employee: _____
Employer: _____
Starting Date of Creditable Service: _____
Percentage Employee is Vested: _____
Designated Beneficiary: _____

Payee of Survivor Benefits: _____
Description of Benefits: _____
Value of Community Interest in Plan (as of _____): \$ _____

c. IRA/SEP

i. Name of Financial Institution: _____
Account Name: _____
Account Number: _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Current Account Balance (as of _____): \$ _____
Value of Community Interest (as of _____): \$ _____

ii. Name of Financial Institution: _____
Account Name: _____
Account Number: _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Current Account Balance (as of _____): \$ _____
Value of Community Interest (as of _____): \$ _____

d. Military Benefits

i. Branch of Service: _____
Name of Service Member: _____
Rank/Pay Grade of Service Member: _____
Starting Date of Creditable Service: _____
Status of Service Member (Active/Reserve/Retired): _____
Payee of Survivor Benefits: _____
Description of Benefits: _____
Monthly Benefit Payable: \$ _____
Value of Community Interest in Plan (as of _____): \$ _____
Percentage of Plan that is Community: _____

- ii. Branch of Service: _____
Name of Service Member: _____
Rank/Pay Grade of Service Member: _____
Starting Date of Creditable Service: _____
Status of Service Member (Active/Reserve/Retired): _____
Payee of Survivor Benefits: _____
Description of Benefits: _____
Monthly Benefit Payable: \$ _____
Value of Community Interest in Plan (as of _____): \$ _____
Percentage of Plan that is Community: _____

e. Nonqualified Plans

- i. Name of Financial Institution: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Value of Community Interest in Plan (as of _____): \$ _____

- ii. Name of Financial Institution: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Value of Community Interest in Plan (as of _____): \$ _____

f. Government Benefits. Civil service, teacher, railroad, state and local.

- i. Name of Plan: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____

Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Value of Community Interest in Plan (as of _____): \$ _____

ii. Name of Plan: _____
Account Name: _____
Account Number: _____
Account Balance as of Date of Marriage: \$ _____
Payee of Survivor Benefits: _____
Designated Beneficiary: _____
Value of Community Interest in Plan (as of _____): \$ _____

10. Other Deferred Compensation Benefits. This includes worker's compensation, disability benefits, other "special payments", and other forms of compensation.

a. Husband

Description of Asset	Value
_____	_____
_____	_____
_____	_____

b. Wife

Description of Asset	Value
_____	_____
_____	_____
_____	_____

11. Union Benefits. Include all insurance, pensions, retirement benefits, and other benefits arising out of the membership in any union.

a. Name of Union Member: _____
Name of Union: _____
Description of Benefits: _____
Value (as of _____): \$ _____

b. Name of Union Member: _____
Name of Union: _____

Description of Benefits: _____

Value (as of _____): \$ _____

12. Insurance and Annuities.

a. Life Insurance

i. Name of Insurance Company: _____

Policy Number: _____

Name of Insured: _____

Name of Owner: _____

Type of Insurance (term/whole/universal): _____

Amount of Premiums (monthly/quarterly/semiannually): \$ _____

Date of Issue: _____

Face Amount: \$ _____

Cash Surrender Value on Date of Marriage: \$ _____

Current Cash Surrender Value: \$ _____

Designated Beneficiary: _____

Balance of Loan Against Policy: \$ _____

Value of Community Interest (as of _____): \$ _____

ii. Name of Insurance Company: _____

Policy Number: _____

Name of Insured: _____

Name of Owner: _____

Type of Insurance (term/whole/universal): _____

Amount of Premiums (monthly/quarterly/semiannually): \$ _____

Date of Issue: _____

Face Amount: \$ _____

Cash Surrender Value on Date of Marriage: \$ _____

Current Cash Surrender Value: \$ _____

Designated Beneficiary: _____

Balance of Loan Against Policy: \$ _____

Value of Community Interest (as of _____): \$ _____

b. Annuities

i. Name of Company: _____
Policy Number: _____
Name of Annuitant: _____
Name of Owner: _____
Type of Annuity: _____
Amount of Premiums (monthly/quarterly/semiannually): \$ _____
Date of Issue: _____
Face Amount: \$ _____
Designated Beneficiary: _____
Value on Date of Marriage: \$ _____
Current Value (as of _____): \$ _____
Balance of Loan Against Policy: \$ _____
Value of Community Interest (as of _____): \$ _____

ii. Name of Company: _____
Policy Number: _____
Name of Annuitant: _____
Name of Owner: _____
Type of Annuity: _____
Amount of Premiums (monthly/quarterly/semiannually): \$ _____
Date of Issue: _____
Face Amount: \$ _____
Designated Beneficiary: _____
Value on Date of Marriage: \$ _____
Current Value (as of _____): \$ _____
Balance of Loan Against Policy: \$ _____
Value of Community Interest (as of _____): \$ _____

13. Motor Vehicles, Boats, Airplanes, Cycles, etc. This includes mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles.

a. Year: _____

Make: _____
Model: _____
Name on Certificate of Title: _____
In Possession of: _____
Vehicle Identification Number: _____
Name of Creditor if Loan Against Vehicle: _____
Current Balance (as of _____): \$ _____
Current Net Equity in Vehicle: \$ _____

b. Year: _____
Make: _____
Model: _____
Name on Certificate of Title: _____
In Possession of: _____
Vehicle Identification Number: _____
Name of Creditor if Loan Against Vehicle: _____
Current Balance (as of _____): \$ _____
Current Net Equity in Vehicle: \$ _____

c. Year: _____
Make: _____
Model: _____
Name on Certificate of Title: _____
In Possession of: _____
Vehicle Identification Number: _____
Name of Creditor if Loan Against Vehicle: _____
Current Balance (as of _____): \$ _____
Current Net Equity in Vehicle: \$ _____

d. Year: _____
Make: _____
Model: _____
Name on Certificate of Title: _____

In Possession of: _____
 Vehicle Identification Number: _____
 Name of Creditor if Loan Against Vehicle: _____
 Current Balance (as of _____): \$ _____
 Current Net Equity in Vehicle: \$ _____

14. Money Owed to Me or My Spouse. Include any expected federal or state income tax refund but do not include receivables connected with a business.

a. Name of Debtor: _____
 Debtor's Relationship to You: _____
 Is Debt Evidenced in Writing? (Yes or No): _____
 Is Debt Secured? (Yes or No): _____
 Current loan amount owed (as of _____): \$ _____

b. Name of Debtor: _____
 Debtor's Relationship to You: _____
 Is Debt Evidenced in Writing? (Yes or No): _____
 Is Debt Secured? (Yes or No): _____
 Current loan amount owed (as of _____): \$ _____

15. Household Furniture, Furnishings, and Fixtures.

a. *In Possession of Husband* (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

b. *In Possession of Wife* (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

16. Electronics and Computers.

- a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset

Value

- b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset

Value

17. **Antiques, Artwork, and Collections.** Include any works of art, such as paintings, tapestry, rugs, and coin or stamp collections.

- a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset

Value

- b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset

Value

18. **Miscellaneous Sporting Goods and Firearms.**

- a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset

Value

- b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset

Value

_____	_____
_____	_____

19. Jewelry and Other Personal Items.

- a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

- b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

20. Livestock. Include cattle, horses, and so forth.

- a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

- b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

21. Club Memberships.

- a. Name of Club: _____
Name Membership Held In: _____
Account Number: _____
Current Value (as of _____): \$ _____

Method of Valuation: _____

b. Name of Club: _____

Name Membership Held In: _____

Account Number: _____

Current Value (as of _____): \$ _____

Method of Valuation: _____

22. **Travel Award Benefits.** Include frequent-flyer mileage accounts.

a. Name of Airline: _____

Account Number: _____

Current Number of Miles (as of _____): _____

Current Value (as of _____): \$ _____

b. Name of Airline: _____

Account Number: _____

Current Number of Miles (as of _____): _____

Current Value (as of _____): \$ _____

23. **Miscellaneous Assets.** Include intellectual property, licenses, crops, farm equipment, construction equipment, tools, leases, cemetery lots, gold or silver coins not part of a collection described elsewhere in this inventory, estimated tax payments, tax overpayments, loss carry-forward deductions, lottery tickets/winnings, stadium bonds, stadium seat licenses, seat options, and season tickets.

a. ***In Possession of Husband*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

b. ***In Possession of Wife*** (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

24. Safe-Deposit Boxes.

a. Name of Financial Institution or other depository: _____

Box Number: _____

Names of Persons with Access to Contents: _____

Items in Safe-Deposit Box: _____

b. Name of Financial Institution or other depository: _____

Box Number: _____

Names of Persons with Access to Contents: _____

Items in Safe-Deposit Box: _____

c. Name of Financial Institution or other depository: _____

Box Number: _____

Names of Persons with Access to Contents: _____

Items in Safe-Deposit Box: _____

25. Storage Facilities.

a. Name and Location: _____

Unit Number: _____

Terms and Length of Lease: _____

Names of Persons with Access to Contents: _____

Items in Storage Unit: _____

b. Name and Location: _____

Unit Number: _____
Terms and Length of Lease: _____
Names of Persons with Access to Contents: _____

Items in Storage Unit: _____

c. Name and Location: _____

Unit Number: _____
Terms and Length of Lease: _____
Names of Persons with Access to Contents: _____

Items in Storage Unit: _____

26. Community Claim for Reimbursement.

a. *Reimbursement claim against husband's separate estate:*

Basis of Claim: _____
Amount Claimed (as of _____): \$ _____

b. *Reimbursement claim against wife's separate estate:*

Basis of Claim: _____
Amount Claimed (as of _____): \$ _____

27. Claims for Economic Contribution of Community Estate.

a. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property owned before marriage by husband, to the extent the debt existed at the time of marriage:

Basis of Claim: _____
Amount Claimed (as of _____): \$ _____

- b. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property owned before marriage by wife, to the extent the debt existed at the time of marriage:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- c. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property received by husband by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- d. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property received by wife by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- e. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property and incurred for capital improvements to property belonging to husband's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- f. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property and incurred for capital improvements to property belonging to wife's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- g. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt incurred during the marriage, secured by a lien on property owned by husband for which the creditor agreed to look for repayment solely to the separate marital

estate of husband, and incurred for the acquisition of, or for capital improvements, to the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- h. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt incurred during the marriage, secured by a lien on property owned by wife for which the creditor agreed to look for repayment solely to the separate marital estate of wife, and incurred for the acquisition of, or for capital improvements, to the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- i. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- j. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- k. Claim for economic contribution due to expenditures for capital improvements to property belonging to husband's separate estate other than by incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- l. Claim for economic contribution due to expenditures for capital improvements to property belonging to wife's separate estate other than by incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

28. Contingent Assets. This is any lawsuits by either party against a third party.

- a. Nature of Claim: _____
Amount of Claim: \$ _____
- b. Nature of Claim: _____
Amount of Claim: \$ _____

29. Community Liabilities.

a. Credit Cards and Charge Accounts

- i. Name of Creditor: _____
Account Number: _____
Name(s) on Account: _____
Current Balance (as of _____): \$ _____
Balance as of Date of Separation: \$ _____
- ii. Name of Creditor: _____
Account Number: _____
Name(s) on Account: _____
Current Balance (as of _____): \$ _____
Balance as of Date of Separation: \$ _____
- iii. Name of Creditor: _____
Account Number: _____
Name(s) on Account: _____
Current Balance (as of _____): \$ _____
Balance as of Date of Separation: \$ _____
- iv. Name of Creditor: _____
Account Number: _____
Name(s) on Account: _____
Current Balance (as of _____): \$ _____
Balance as of Date of Separation: \$ _____
- v. Name of Creditor: _____
Account Number: _____

Name(s) on Account: _____

Current Balance (as of _____): \$ _____

Balance as of Date of Separation: \$ _____

b. Federal, State, and Local Tax Liability

i. Amount Owed in Any Previous Tax Year (describe liability, e.g., federal income tax/property taxes): \$ _____

Amount Owed for Current Year: \$ _____

ii. Amount Owed in Any Previous Tax Year (describe liability, e.g., federal income tax/property taxes): \$ _____

Amount Owed for Current Year: \$ _____

c. Attorney's Fees in This Case

i. Husband (as of _____): \$ _____

ii. Wife (as of _____): \$ _____

d. Other Professional Fees in This Case

i. Husband (as of _____): \$ _____

ii. Wife (as of _____): \$ _____

e. **Other Liabilities Not Otherwise Listed in This Inventory.** This includes loans, margin accounts, if not previously disclosed.

i. Name of Creditor: _____

Account Number: _____

Party Incurring Liability: _____

Is loan evidences in writing? (Yes or No): _____

Current Balance (as of _____): \$ _____

Security, if any: _____

ii. Name of Creditor: _____

Account Number: _____

Party Incurring Liability: _____

Is loan evidences in writing? (Yes or No): _____

Current Balance (as of _____): \$ _____

Security, if any: _____

iii. Name of Creditor: _____

Account Number: _____

Party Incurring Liability: _____

Is loan evidences in writing? (Yes or No): _____

Current Balance (as of _____): \$ _____

Security, if any: _____

f. Reimbursement Claims Against Community Estate Other than for Economic Contribution

i. Reimbursement claim by husband's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

ii. Reimbursement claim by wife's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

g. Economic Contribution Claims Against Community Estate

i. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of that part of a debt (including home equity loan) incurred during the marriage, secured by a lien on property, and incurred for the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

ii. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of that part of a debt (including home equity loan) incurred during the marriage, secured by a lien on property, and incurred for the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- iii. Claim for economic contribution due to refinancing of the principal amount of any debt described in _____ above, to the extent the refinancing reduced the principal amount in a manner described in this section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- iv. Claim for economic contribution due to refinancing of the principal amount of any debt described in _____ above, to the extent the refinancing reduced the principal amount in a manner described in this section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- v. Claim for economic contribution by husband's separate estate due to expenditures for capital improvements to property belonging to the community estate other than by incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- vi. Claim for economic contribution by wife's separate estate due to expenditures for capital improvements to property belonging to the community estate other than by incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- h. **Pledges.** Include charitable, church, and school related.

- i. Name and Address of Recipient: _____

Date of Pledge: _____

Total Amount of Pledge: _____

Is Pledge Payable in Installments? (Yes or No): _____

Date Each Installment Payment is Due: _____

Amount of Each Installment: _____

- i. **Contingent Liabilities.** This is a lawsuit against either party or guaranty either party may have signed.

- i. Name of Creditor: _____
 Name of Person Primarily Liable: _____
 Amount of Contingent Liability: \$ _____
 Nature of Contingency: _____
- ii. Name of Creditor: _____
 Name of Person Primarily Liable: _____
 Amount of Contingent Liability: \$ _____
 Nature of Contingency: _____

Separate Estates of the Parties

30. Separate Assets of Husband. This is generally defined as assets owed before marriage or assets acquired during the marriage by gift or inheritance or as a result of personal injury.

- a. Description of Asset: _____
 Date Property Acquired: _____
 How Acquired (by gift, devise, descent, or owned before marriage): _____
 Value (as of _____): \$ _____
- b. Husband's separate reimbursement claim against community estate other than for economic contribution:
 Basis of Claim: _____
 Value (as of _____): \$ _____
- c. Husband's separate reimbursement claim against wife's separate estate other than for economic contribution:
 Basis of Claim: _____
 Value (as of _____): \$ _____
- d. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt secured by a lien on property owned before marriage by wife, to the extent the debt existed at the time of marriage:
 Basis of Claim: _____
 Value (as of _____): \$ _____

- e. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt secured by a lien on property received by wife by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Value (as of _____): \$ _____

- f. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property incurred for the acquisition of, or capital improvements to property belonging to the community estate:

Basis of Claim: _____

Value (as of _____): \$ _____

- g. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property and incurred for capital improvements to property belonging to wife's separate estate:

Basis of Claim: _____

Value (as of _____): \$ _____

- h. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt incurred during the marriage, secured by a lien on property owned by wife for which the creditor agreed to look for repayment solely to the separate marital estate of wife, and incurred for the acquisition of, or for capital improvements to the property:

Basis of Claim: _____

Value (as of _____): \$ _____

- i. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduces the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Value (as of _____): \$ _____

- j. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduces the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Value (as of _____): \$ _____

- k. Claim for economic contribution by husband's separate estate due to expenditures for capital improvements to property belonging to wife's separate estate other than by incurring debt:

Basis of Claim: _____

Value (as of _____): \$ _____

- l. Claim for economic contribution by husband's separate estate due to expenditures for capital improvements to property belonging to the community estate other than by incurring debt:

Basis of Claim: _____

Value (as of _____): \$ _____

31. Liabilities of Husband's Separate Estate.

- a. Description of Liability: _____

Date of Liability: _____

How Liability Acquired: _____

Amount of Liability (as of _____): \$ _____

- b. Wife's separate reimbursement claim against husband's separate estate other than for economic contribution:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- c. Community estate's reimbursement claim against husband's separate estate other than for economic contribution:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- d. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property owned before marriage by husband, to the extent the debt existed at the time of marriage:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- e. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt secured by a lien on property owned before marriage by husband, to the extent the debt existed at the time of marriage:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- f. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property received by husband by gift, devise, or descent during the marriage, to the extent that the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- g. Claim for economic contribution due to reduction by the wife's separate estate of the principal amount of a debt secured by a lien on property received by husband, by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- h. Claim for economic contribution due to reduction by the community estate of the principal amount of that part of the debt (including a home equity loan) incurred during the marriage, secured by a lien on property, and incurred for capital improvements to the property belonging to husband's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- i. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of that part of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property, and incurred for capital improvements to property belonging to husband's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- j. Claim for economic contribution due to reduction by the community estate of the principal amount of that part of a debt incurred during the marriage, secured by a lien on property, and owned by husband for which the creditor agreed to look for repayment solely to the separate marital estate of the husband, and incurred for acquisition of, or for capital improvements to the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- k. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of that part of a debt incurred during the marriage, secured by a lien on property owned by husband for which the creditor agreed to look for repayment solely to the separate marital estate of the husband, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- l. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- m. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- n. Claim for economic contribution by the community estate due to expenditures for capital improvements to property belonging to husband's separate estate other than incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- o. Claim for economic contribution by wife's separate estate due to expenditures for capital improvements to property belonging to husband's separate estate other than incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

32. **Separate Assets of Wife.** This is generally defined as assets owed before marriage or assets acquired during the marriage by gift or inheritance or as a result of personal injury.

a. Description of Asset: _____

Date Property Acquired: _____

How Acquired (by gift, devise, descent, or owned before marriage): _____

Value (as of _____): \$ _____

b. Wife's separate reimbursement claim against community estate other than for economic contribution:

Basis of Claim: _____

Value (as of _____): \$ _____

c. Wife's separate reimbursement claim against husband's separate estate other than for economic contribution:

Basis of Claim: _____

Value (as of _____): \$ _____

d. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt secured by a lien on property owned before marriage by husband, to the extent the debt existed at the time of marriage:

Basis of Claim: _____

Value (as of _____): \$ _____

e. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt secured by a lien on property received by husband by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Value (as of _____): \$ _____

f. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property incurred for the acquisition of, or capital improvements to property belonging to the community estate:

Basis of Claim: _____

Value (as of _____): \$ _____

- g. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property and incurred for capital improvements to property belonging to husband's separate estate:

Basis of Claim: _____

Value (as of _____): \$ _____

- h. Claim for economic contribution due to reduction by wife's separate estate of the principal amount of a debt incurred during the marriage, secured by a lien on property owned by husband for which the creditor agreed to look for repayment solely to the separate marital estate of husband, and incurred for the acquisition of, or for capital improvements to the property:

Basis of Claim: _____

Value (as of _____): \$ _____

- i. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduces the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Value (as of _____): \$ _____

- j. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduces the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Value (as of _____): \$ _____

- k. Claim for economic contribution by wife's separate estate due to expenditures for capital improvements to property belonging to husband's separate estate other than by incurring debt:

Basis of Claim: _____

Value (as of _____): \$ _____

1. Claim for economic contribution by wife's separate estate due to expenditures for capital improvements to property belonging to the community estate other than by incurring debt:

Basis of Claim: _____

Value (as of _____): \$ _____

33. Liabilities of Wife's Separate Estate.

- a. Description of Liability: _____

Date of Liability: _____

How Liability Acquired: _____

Amount of Liability (as of _____): \$ _____

- b. Husband's separate reimbursement claim against wife's separate estate other than for economic contribution:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- c. Community estate's reimbursement claim against wife's separate estate other than for economic contribution:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- d. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property owned before marriage by wife, to the extent the debt existed at the time of marriage:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- e. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt secured by a lien on property owned before marriage by wife, to the extent that the debt existed at the time of marriage:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- f. Claim for economic contribution due to reduction by the community estate of the principal amount of a debt secured by a lien on property received by wife, by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- g. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of a debt secured by a lien on property received by wife by gift, devise, or descent during the marriage, to the extent the debt existed at the time the property was received:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- h. Claim for economic contribution due to reduction by the community estate of the principal amount of that part of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property, and incurred for capital improvements to property belonging to wife's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- i. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of that part of a debt (including a home equity loan) incurred during the marriage, secured by a lien on property, and incurred for capital improvements to property belonging to wife's separate estate:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- j. Claim for economic contribution due to reduction by the community estate of the principal amount of that part of a debt incurred during the marriage, secured by a lien on property owned by wife for which the creditor agreed to look for repayment solely to the separate marital estate of the wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- k. Claim for economic contribution due to reduction by husband's separate estate of the principal amount of that part of a debt incurred during the marriage, secured by a lien on property owned by wife for which the creditor agreed to look for repayment solely to the

separate marital estate of the wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- l. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- m. Claim for economic contribution due to refinancing of the principal amount of any debt described in section _____ above, to the extent the refinancing reduced the principal amount in a manner described in the appropriate section:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- n. Claim for economic contribution by the community estate due to expenditures for capital improvements to property belonging to wife's separate estate other than incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

- o. Claim for economic contribution by husband's separate estate due to expenditures for capital improvements to property belonging to wife's separate estate other than incurring debt:

Basis of Claim: _____

Amount Claimed (as of _____): \$ _____

34. Children's Property. This includes custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act

a. Name of Financial Institution: _____

Address of Financial Institution: _____

Name of Account: _____

Account Number: _____

Amount on Deposit (as of _____): \$ _____

Name of minor for whom funds were deposited: _____

- b. Name of Financial Institution: _____
 Address of Financial Institution: _____
 Name of Account: _____
 Account Number: _____
 Amount on Deposit (as of _____): \$ _____
 Name of minor for whom funds were deposited: _____
- c. Name of Financial Institution: _____
 Address of Financial Institution: _____
 Name of Account: _____
 Account Number: _____
 Amount on Deposit (as of _____): \$ _____
 Name of minor for whom funds were deposited: _____
- d. Name of Financial Institution: _____
 Address of Financial Institution: _____
 Name of Account: _____
 Account Number: _____
 Amount on Deposit (as of _____): \$ _____
 Name of minor for whom funds were deposited: _____

Trust and Estate Assets

35. **Assets Held by Either Party for the Benefit of Another.** This includes formal and informal trusts.

- a. Name(s) of person(s) holding assets: _____
 Description of Assets: _____

 Name and Title of Fiduciary (e.g., executor, trustee): _____
 Name of Owner of Beneficial Interest: _____
 Value of Assets (as of _____): \$ _____
- b. Name(s) of person(s) holding assets: _____
 Description of Assets: _____

Name and Title of Fiduciary (e.g., executor, trustee): _____

Name of Owner of Beneficial Interest: _____

Value of Assets (as of _____): \$ _____

36. Assets Held for the Benefit of Either Party as a Beneficiary. This includes formal and informal trusts).

a. Name(s) of person(s) holding assets: _____

Description of Assets: _____

Name and Title of Fiduciary (e.g., executor, trustee): _____

Name of Owner of Beneficial Interest: _____

Value of Assets (as of _____): \$ _____

b. Name(s) of person(s) holding assets: _____

Description of Assets: _____

Name and Title of Fiduciary (e.g., executor, trustee): _____

Name of Owner of Beneficial Interest: _____

Value of Assets (as of _____): \$ _____