

## 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 current value of property, you should make your own independent estimate, whether you decide the value or consult another source (for example, NADA, Kelly Blue Book, or an appraiser). Please list all property whether the property is in your possession or name or in your spouse's possession or name. This inventory and appraisal should include all property, even if you have no specifics on the property.

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 on the inventory. If you do not know the answer to an item, do not leave it blank; write "I don't know," and follow this statement with the reason you do not know.

**Understand that this inventory and appraisal is your attorney's main key to your estate, from which all spreadsheets will be generated. This document, once filed with the court, creates a judicial admission about its contents. This document is extremely important and will be used throughout your case.**

**YOU SHOULD RETURN THIS FORM AND ALL SUPPORTING DOCUMENTS TO OUR OFFICE WITHIN THIRTY (30) DAYS, IF AT ALL POSSIBLE.** This will allow our office ample time to put the document in final form.

This 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, because the inventory will be one of the most important documents in your divorce. Also, please understand that your inventory can be amended, if necessary, as your case progresses. Therefore, while it is important for you to provide accurate, detailed information for your inventory, you will have an opportunity to amend and correct the inventory should additional information be acquired during the discovery process or should previous responses prove to be inaccurate.

### **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 items you want to go to the husband.

### **Definitions**

Separate Property - If either you or your spouse has any property you think is separate property, complete the section marked "Separate Estates of the Parties." Separate property is defined as follows:

1. Property acquired by a spouse before marriage.
2. Property acquired by a spouse during marriage by gift or inheritance.
3. Funds received as a result of personal injury sustained by a spouse.
4. Property acquired with funds that are separate property. Property may be purchased with funds that are both community and separate property. In such a case, please be sure to list pro rata the part that is separate property in the separate property section and the part that is community property in the community property section.

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.

**IMPORTANT: 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 Appraisal. If an asset has a title document (deed, deed of trust, certificate of title to motor vehicle, etc.), return a copy with this Preparation of Inventory and Appraisal. If an asset has any document that can clearly identify it, return a copy with this Preparation of Inventory and Appraisal.

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

1. financial institution statements;
2. bank statements;
3. annuity statements;
4. IRA statements;
5. SEP statements;
6. certificate of deposit statements;
7. retirement 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.

**NOTE:** PLEASE ATTACH SUPPORTING DOCUMENTS FOR EACH ITEM LISTED IN THE INVENTORY AND LABEL EACH DOCUMENT (BY USING A SEPARATE FILE OR POST-IT NOTE) WITH THE CORRESPONDING NUMBER IN THE INVENTORY AND APPRAISEMENT. PLEASE PERFORM THIS TASK EVEN IF YOU HAVE OTHERWISE GIVEN US THE DOCUMENTS. IF YOU NEED ACCESS TO A DOCUMENT FOR THIS PURPOSE, PLEASE COME TO OUR OFFICE AND USE ONE OF THE CONFERENCE ROOMS TO COMPLETE THIS ASSIGNMENT. IT IS VERY IMPORTANT WE HAVE BACKUP DOCUMENTATION FOR EACH ASSET AND DEBT.

WARNING – Please do not write on the original documents themselves. Use Post-it notes, please.

**Full Disclosure**

Finally, I will rely on this Preparation of Inventory and Appraisement in the case. If you omit any asset, the court could set it aside to your 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 Appraisement."

\_\_\_\_\_  
Client

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

**CLIENT NAME:** \_\_\_\_\_

**CLIENT QUESTIONNAIRE - Inventory and Appraisal  
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 time-shares)

1.1. 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: \$ \_\_\_\_\_

1.2. 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: \$ \_\_\_\_\_

1.3. 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)

2.1. Name of mineral interest/lease/well: \_\_\_\_\_  
\_\_\_\_\_

Type of interest: \_\_\_\_\_

County of location: \_\_\_\_\_

Legal description: \_\_\_\_\_

Name of producer/operator: \_\_\_\_\_

Current value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

2.2. Name of mineral interest/lease/well: \_\_\_\_\_  
\_\_\_\_\_

Type of interest: \_\_\_\_\_

County of location: \_\_\_\_\_

Legal description: \_\_\_\_\_

Name of producer/operator: \_\_\_\_\_

Current value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

2.3. 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)

3.1. Cash on hand: \_\_\_\_\_

3.2. Traveler's checks: \_\_\_\_\_

3.3. Money orders: \_\_\_\_\_

3.4. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.5. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.6. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.7. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

Account number: \_\_\_\_\_

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

#### **4. Brokerage/Mutual Fund Accounts**

4.1. 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 ):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4.2. 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):

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Margin loan balance (as of \_\_\_\_\_):

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Value of community interest in each account (and subaccounts if any) (as of ):

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4.3. Name of brokerage firm/mutual fund: \_\_\_\_\_

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Address of brokerage firm/mutual fund: \_\_\_\_\_

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Name account held in: \_\_\_\_\_

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Name of account (and subaccounts if any): \_\_\_\_\_

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Account number (and numbers of subaccounts if any):

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Margin loan balance (as of \_\_\_\_\_):

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Value of community interest in each account (and subaccounts if any) (as of ):

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

5.1. Name of security: \_\_\_\_\_

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Number of shares: \_\_\_\_\_

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Type of security: [common stock/preferred stock/bond/other security]: \_\_\_\_\_

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Certificate numbers: \_\_\_\_\_

In possession of: \_\_\_\_\_

Name of exchange on which listed: \_\_\_\_\_

Pledged as collateral? [Yes/No]

Current market value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Value of community interest(as of \_\_\_\_\_):  
\$ \_\_\_\_\_

5.2. 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/No]

Current market value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Value of community interest(as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**6. Stock Options** (include all exercisable, nonexercisable, vested and nonvested stock options regardless of any restrictions on transfer)

6.1. Name of company: \_\_\_\_\_

Date of option/grant: \_\_\_\_\_

Vesting schedule: \_\_\_\_\_

Number of options: \_\_\_\_\_

Are the options exercisable? [Yes/No]

Are the options registered? [Yes/No]

Current stock price: \$ \_\_\_\_\_

Strike price: \$ \_\_\_\_\_

Current net market value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

6.2. Name of company: \_\_\_\_\_

Date of option/grant: \_\_\_\_\_

Vesting schedule: \_\_\_\_\_

Number of options: \_\_\_\_\_

Are the options exercisable? [Yes/No]

Are the options registered? [Yes/No]

Current stock price: \$ \_\_\_\_\_

Strike price: \$ \_\_\_\_\_

Current net market value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

## 7. Bonuses

7.1. Name of company: \_\_\_\_\_

Date bonus expected to be paid: \_\_\_\_\_

Time period covered by bonus: \_\_\_\_\_

Anticipated amount of bonus: \$ \_\_\_\_\_

7.2. Name of company: \_\_\_\_\_  
Date bonus expected to be paid: \_\_\_\_\_  
Time period covered by bonus: \_\_\_\_\_  
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 nonpublicly traded business entities)

8.1. 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**

9.A. *Defined Contribution Plans* (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))

9.A.1. Exact name of plan: \_\_\_\_\_  
Name and address of plan administrator: \_\_\_\_\_  
Employee: \_\_\_\_\_  
Employer: \_\_\_\_\_

Starting date of creditable service: \_\_\_\_\_

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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.A.2. Exact name of plan: \_\_\_\_\_

Name and address of plan administrator: \_\_\_\_\_

Employee: \_\_\_\_\_

Employer: \_\_\_\_\_

Starting date of creditable service: \_\_\_\_\_

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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.B. *Defined Benefit Plan* (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula)

9.B.1. Exact name of plan: \_\_\_\_\_

Name and address of plan administrator: \_\_\_\_\_

Employee: \_\_\_\_\_

Employer: \_\_\_\_\_

Starting date of creditable service: \_\_\_\_\_

Designated beneficiary: \_\_\_\_\_

Payee of survivor benefits: \_\_\_\_\_

Description of benefits: \_\_\_\_\_

Value of community interest in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

9.B.2. Exact name of plan: \_\_\_\_\_

Name and address of plan administrator: \_\_\_\_\_

Employee: \_\_\_\_\_

Employer: \_\_\_\_\_

Starting date of creditable service: \_\_\_\_\_

Designated beneficiary: \_\_\_\_\_

Payee of survivor benefits: \_\_\_\_\_

Description of benefits: \_\_\_\_\_

Value of community interest in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

9.C. *IRA/SEP*

9.C.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.C.2. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

**9.D. *Military Benefits***

9.D.1. 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: \_\_\_\_\_%

9.D.2. 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: \_\_\_\_\_%

9.E. *Nonqualified Plans (Not under ERISA)*

9.E.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.E.2. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.F. *Government Benefits* (civil service, teacher, railroad, state and local)

9.F.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

9.F.2. 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** (e.g., worker's compensation, disability benefits, other "special payments", and other forms of compensation)

10.1. Husband

Description of Asset	Value
_____	_____
_____	_____
_____	_____

10.2. Wife

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**11. Union Benefits** (include all insurance, pensions, retirement benefits, and other benefits arising out of membership in any union)

11.1. Name of union member: \_\_\_\_\_

Name of Union: \_\_\_\_\_

Description of benefits: \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

11.2. Name of union member: \_\_\_\_\_

Name of Union: \_\_\_\_\_

Description of benefits: \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

**12. Insurance and Annuities**

12.A. Life Insurance

12.A.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

12.A.2. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

*12.B. Annuities*

12.B.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

12.B.2. 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.** (including mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles)

13.1. 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: \$ \_\_\_\_\_

13.2. 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: \$ \_\_\_\_\_

13.3. 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: \$ \_\_\_\_\_

13.4. 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)

14.1. Name of debtor: \_\_\_\_\_

Debtor's relationship to you: \_\_\_\_\_

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

14.2. Name of debtor: \_\_\_\_\_

Debtor's relationship to you: \_\_\_\_\_

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**15. Household Furniture, Furnishings, and Fixtures**

15.1. In possession of husband (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

15.2. In possession of wife (attach separate sheet by room if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**16. Electronics and Computers**

16.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

16.2. In possession of wife (attach separate sheet 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)

17.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

17.2. In possession of wife (attach separate sheet if necessary):

Description of Asset	Value
_____	_____

---

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**18. Miscellaneous Sporting Goods and Firearms**

18.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

18.2. In possession of wife (attach separate sheet if necessary):

Description of Asset	Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

**19. Jewelry and Other Personal Items**

19.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

19.2. In possession of wife (attach separate sheet if necessary):

Description of Asset	Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

**20. Livestock (include cattle, horses, and so forth)**

20.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

20.2. In possession of wife (attach separate sheet if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**21. Club Memberships**

21.1. Name of club: \_\_\_\_\_

Name membership held in: \_\_\_\_\_

Account number: \_\_\_\_\_

Current value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Method of valuation: \_\_\_\_\_

21.2. 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)**

22.1. Name of airline: \_\_\_\_\_

Account number and name on account: \_\_\_\_\_,  
\_\_\_\_\_

Current number of miles (as of \_\_\_\_\_):  
\_\_\_\_\_

Current value (if any): \$ \_\_\_\_\_

22.2. Name of airline: \_\_\_\_\_

Account number and name on account: \_\_\_\_\_,

\_\_\_\_\_  
Current number of miles (as of \_\_\_\_\_):  
\_\_\_\_\_

Value (if any): \$ \_\_\_\_\_

**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)

23.1. In possession of husband (attach separate sheet if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

23.2. In possession of wife (attach separate sheet if necessary):

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**24. Safe-Deposit Boxes**

24.1. Name of financial institution or other depository:

\_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_

\_\_\_\_\_

Items in safe-deposit box: \_\_\_\_\_

\_\_\_\_\_

24.2. Name of financial institution or other depository:

\_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in safe-deposit box: \_\_\_\_\_  
\_\_\_\_\_

24.3. Name of financial institution or other depository:

\_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in safe-deposit box: \_\_\_\_\_  
\_\_\_\_\_

## 25. Storage Facilities

25.1. Name and location: \_\_\_\_\_  
\_\_\_\_\_

Unit number: \_\_\_\_\_

Terms and length of lease: \_\_\_\_\_  
\_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in storage unit: \_\_\_\_\_  
\_\_\_\_\_

25.2. Name and location: \_\_\_\_\_  
\_\_\_\_\_

Unit number: \_\_\_\_\_

Terms and length of lease: \_\_\_\_\_  
\_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in storage unit: \_\_\_\_\_

\_\_\_\_\_

25.3. 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 Other than for Economic Contribution**

26.1.Reimbursement claim against husband's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

26.2.Reimbursement claim against wife's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**27. Claims for Economic Contribution of Community Estate**

27.1 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.2.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.3.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.4.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.5.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 husband's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

27.6.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.7.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 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.8.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 wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

27.9.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.10.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.11. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

27.12. 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** (e.g., lawsuits by either party against third party)

28.1. Nature of claim: \_\_\_\_\_

Amount of claim: \$ \_\_\_\_\_

28.2. Nature of claim: \_\_\_\_\_

Amount of claim: \$ \_\_\_\_\_

**29. Community Liabilities**

29.A. *Credit Cards and Charge Accounts*

29.A.1. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_>

29.A.2. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_>

29.A.3. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_>

29.A.4. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_>

29.A.5. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_>

*29.B. Federal, State, and Local Tax Liability*

29.B.1. Amount owed in any previous tax year:  
<\$ \_\_\_\_\_>  
[describe liability, e.g., federal income tax/property taxes]

Amount owed for current year \_\_\_\_\_:  
<\$ \_\_\_\_\_>

29.B.2. Amount owed in any previous tax year:  
<\$ \_\_\_\_\_>  
[describe liability, e.g., federal income tax/property taxes]

Amount owed for current year \_\_\_\_\_:  
<\$ \_\_\_\_\_>

*29.C. Attorney's Fees in This Case*

29.C.1. Husband (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

29.C.2. Wife (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

*29.D. Other Professional Fees in This Case*

29.D.1. Husband (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

29.D.2. Wife (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

29.E. *Other Liabilities Not Otherwise Listed in This Inventory* (e.g., loans, margin accounts, if not previously disclosed)

29.E.1. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Party incurring liability: \_\_\_\_\_

Is loan evidenced in writing? [Yes/No]

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

Security, if any: \_\_\_\_\_

29.E.2. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Party incurring liability: \_\_\_\_\_

Is loan evidenced in writing? [Yes/No]

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

Security, if any: \_\_\_\_\_

29.E.3. Name of creditor: \_\_\_\_\_

Account number: \_\_\_\_\_

Party incurring liability: \_\_\_\_\_

Is loan evidenced in writing? [Yes/No]

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

Security, if any: \_\_\_\_\_

29.F. *Reimbursement Claims against Community Estate Other than for Economic Contribution*

29.F.1.Reimbursement claim by husband's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

29.F.2.Reimbursement claim by wife's separate estate:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

*29.G.Economic Contribution Claims against Community Estate*

29.G.1.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 the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

29.G.2.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 the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

29.G.3.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 section:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

29.G.4. 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 section:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

29.G.5. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

29.G.6. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

29.H. *Pledges* (include charitable, church and school related)

29.H.1. Name and address of recipient: \_\_\_\_\_  
\_\_\_\_\_

Date of pledge: \_\_\_\_\_

Total amount of pledge: < \_\_\_\_\_ >

Is pledge payable in installments? [Yes/No]

Date each installment payment is due: \_\_\_\_\_

Amount of each installment: \_\_\_\_\_

29.1. *Contingent Liabilities* (e.g., lawsuit against either party, guaranty either party may have signed)

29.1.1. Name of creditor: \_\_\_\_\_

Name of person primarily liable: \_\_\_\_\_

Amount of contingent liability: <\$ \_\_\_\_\_ >

Nature of contingency: \_\_\_\_\_

29.1.2. 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** (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)

30.1. Description of asset: \_\_\_\_\_

Date property acquired: \_\_\_\_\_

How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

30.2. Husband's separate reimbursement claim against community estate other than for economic contribution:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.4. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.5. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

30.6. 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 the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.7. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

30.8. 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 wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.9. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.10. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.11. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.12. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

### 31. Liabilities of Husband's Separate Estate

31.1. Description of liability: \_\_\_\_\_

Date of liability: \_\_\_\_\_

How liability acquired: \_\_\_\_\_

Amount of liability (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

31.4. 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 \_\_\_\_\_):  
<\$ \_\_\_\_\_>

31.5.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.6.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.7.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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

31.8.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 husband's separate estate:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

31.9.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.10. 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 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

31.12. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.13. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.14. Claim for economic contribution by the community estate 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

31.15. 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** (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)

32.1. Description of asset: \_\_\_\_\_

Date property acquired: \_\_\_\_\_

How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

32.4. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

32.5. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

32.6. 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 the acquisition of, or capital improvements to, property belonging to the community estate:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

32.7. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

32.9. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

32.10. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

32.11. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

32.12. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

**33. Liabilities of Wife's Separate Estate**

33.1. Description of liability: \_\_\_\_\_

Date of liability: \_\_\_\_\_

How liability acquired: \_\_\_\_\_

Amount of liability (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

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

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.4. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.5. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.6.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.7.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.8.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 the acquisition of, or for capital improvements to wife's the property:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.9.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 the acquisition of, or for capital improvements to wife's the property::

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.10. 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 wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.11. 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 wife, and incurred for the acquisition of, or for capital improvements to, the property:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.12. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.13. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.14. Claim for economic contribution by the community estate 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

33.15. 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: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

### **Child's Property**

**34. Child's Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act)

34.1. 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: \_\_\_\_\_

34.2. 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: \_\_\_\_\_

34.3. 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: \_\_\_\_\_

34.4. 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** (include formal and informal trusts)

35.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

35.2. 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** (include formal and informal trusts)

36.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

36.2. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

**Verification**

I, \_\_\_\_\_, state on oath that, to the best of my knowledge and belief, this inventory and appraisal contains –

- 1.a full and complete list of all properties that I claim belong to the community estate of me and my spouse, with the values thereof;
- 2.a full and complete list of all properties in my possession or subject to my control that I claim or admit are my or my spouse's separate property and estate, with the values thereof; and
- 3.a full and complete list of the debts that I claim are community indebtedness.

Any omission from this inventory is not intentional but is done through mere inadvertence and not to mislead my spouse. There may be other assets and liabilities of which my spouse is aware, and the omission of those items from this inventory should not be construed as a waiver of my interest in them.

\_\_\_\_\_

SIGNED under oath before me on \_\_\_\_\_.

\_\_\_\_\_

Notary Public, State of Texas