

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

- 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). Fill out the first pages of this packet for each piece of real property owned.  
**ALL ACCOUNT NUMBERS SHOULD BE REDACTED TO INCLUDE ONLY LAST 3 NUMBERS OF THE ACCOUNT.**

So that we know who is receiving what in this divorce, please designate who is “spouse 1” in this form, and who is spouse 2—

Spouse 1 name: \_\_\_\_\_

Spouse 2 name: \_\_\_\_\_

Street address: \_\_\_\_\_

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

Description of improvements, if any: \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

Current fair market value:

\$ \_\_\_\_\_

Name of mortgage company and account number, if any: \_\_\_\_\_

\_\_\_\_\_

Current balance of mortgage (as of \_\_\_\_\_):

\$ \_\_\_\_\_

Other liens against property (as of \_\_\_\_\_):

\$ \_\_\_\_\_

Names of other lienholders: \_\_\_\_\_

\_\_\_\_\_

Current net equity in property: \$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is currently on the title to the property? \_\_\_\_\_

(you can check by calling the mortgage company)

Who is currently on the mortgage of the property?

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What is the monthly mortgage payment (please be accurate): \_\_\_\_\_  
To what address is the mortgage payment sent:

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What is happening with this property with your divorce?

OPTIONS:

- a. We are selling it not later than \_\_\_\_\_  
When we sell it, we are splitting the proceeds as follows:  
\_\_\_\_\_
- b. One spouse is receiving the property and paying the mortgage (Which spouse)  
\_\_\_\_\_
- c. We are going to continue to jointly own the property as follows:  
(we do not recommend this option, but if you are doing this, we will need to know the following):  
\_\_\_\_\_

Who is allowed to live in the house during joint ownership:

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Who will pay the mortgage during joint ownership:

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If Mortgage is not paid, will the house be sold immediately to protect credit?

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If the house is to be rented, who will manage the rental property work such as collections, maintenance, etc?

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What joint account will the parties operate the rental property from (financial institution and last three of account numbers.

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By what date will the joint property be sold by:

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How will proceeds be split?

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Who will pay maintenance fees on the jointly owned property?

\_\_\_\_\_

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

\_\_\_\_\_

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

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

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

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

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

Source(s) of value: \_\_\_\_\_

\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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

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

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

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

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

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

Source(s) of value/balance: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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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 amount balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value/balance: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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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 amount balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value/balance: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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 amount balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value/balance: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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**4. Brokerage and Mutual Fund Accounts**

4.1. Name of brokerage firm or mutual fund: \_\_\_\_\_

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

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

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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Tax basis of each security held: \$ \_\_\_\_\_

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Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

4.2. Name of brokerage firm or mutual fund: \_\_\_\_\_  
\_\_\_\_\_

Address of brokerage firm or 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 \_\_\_\_):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tax basis of each security held: \$ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Address of brokerage firm or 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 \_\_\_\_):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Tax basis of each security held: \$ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

**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: \_\_\_\_\_

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]

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



Tax basis:\$ \_\_\_\_\_

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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]

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

Tax basis:\$ \_\_\_\_\_

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

**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: \$ \_\_\_\_\_

If purchased, total purchase price of option contract (including commissions):  
\$ \_\_\_\_\_

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

If purchased, total purchase price of option contract (including commissions):  
\$ \_\_\_\_\_

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

## 7. Bonuses

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

Spouse earning bonus: \_\_\_\_\_

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

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

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

Source(s) of value: \_\_\_\_\_

7.2. Name of company: \_\_\_\_\_

Spouse earning bonus: \_\_\_\_\_

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

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

**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 basis accounting: \$ \_\_\_\_\_

Balance of liabilities if on cash basis accounting: \_\_\_\_\_  
<\$ \_\_\_\_\_ >

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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: \_\_\_\_\_%

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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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: \_\_\_\_\_%

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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 \_\_\_\_\_):  
\$ \_\_\_\_\_  
Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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 \_\_\_\_\_):  
\$ \_\_\_\_\_  
Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:

(example: 100% to Spouse 1 or 50% to spouse 1)

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**10. Other Deferred Compensation Benefits** (e.g., worker's compensation, disability benefits, other "special payments", and other forms of compensation)

10.1. Spouse 1

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

10.2. Spouse 2

Description of Asset	Value	Source(s) of 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 \_\_\_\_\_):\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

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How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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

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

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

## 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 \_\_\_\_\_):

\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

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

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

### 12.C. *Health Savings Accounts*

12.C.1. Institution holding account: \_\_\_\_\_

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

Name of high-deductible health plan with which the HSA is coupled: \_\_\_\_\_

---

Value of assets in account (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

12.C.2. Institution holding account: \_\_\_\_\_

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

Name of high-deductible health plan with which the HSA is coupled: \_\_\_\_\_  
\_\_\_\_\_

Value of assets in account (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

12.D. *Medical Savings Accounts*

12.D.1. Institution holding account: \_\_\_\_\_

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

Name of high-deductible health plan with which the MSA is coupled: \_\_\_\_\_  
\_\_\_\_\_

Value of assets in account (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

12.D.2. Institution holding account: \_\_\_\_\_

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

Name of high-deductible health plan with which the MSA is coupled: \_\_\_\_\_

Value of assets in account (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
Who is the current owner of this asset (spouse 1, spouse 2 or both):

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

**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 title: \_\_\_\_\_

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

Vehicle identification number: \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

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

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

Current net equity in vehicle: \$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

13.2. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

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

Vehicle identification number: \_\_\_\_\_

Fair market value of vehicle: \$ \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

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

Current net equity in vehicle: \$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

13.3. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

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

Vehicle identification number: \_\_\_\_\_

Fair market value of vehicle: \$ \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

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

Current net equity in vehicle: \$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

13.4. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

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

Vehicle identification number: \_\_\_\_\_

Fair market value of vehicle: \$ \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

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

Current net equity in vehicle: \$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

15.1. In possession of Spouse 1 (attach separate sheet by room if necessary):

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:  
\_\_\_\_\_

15.2. In possession of Spouse 2 (attach separate sheet by room if necessary):

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

**16. Electronics and Computers**

16.1. In possession of Spouse 1 (attach separate sheet by room if necessary):

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

\_\_\_\_\_

16.2. In possession of Spouse 2 (attach separate sheet by room if necessary):

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

\_\_\_\_\_

**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 Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
_____		
_____		
_____		

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:



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17.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
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**18. Miscellaneous Sporting Goods and Firearms**

18.1. In possession of Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
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---

Will the spouse not in possession be receiving any item above? If so, please list the item to be given to the spouse not currently in possession:

---

18.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
----------------------	-------	--------------------

---

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---

Will the spouse not in possession be receiving any item above? If so, please list the item to be given to the spouse not currently in possession:

---

**19. Jewelry and Other Personal Items**

19.1. In possession of Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
----------------------	-------	--------------------

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Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

19.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
----------------------	-------	--------------------

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---

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

20.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
----------------------	-------	--------------------

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Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

## 21. Club Memberships

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

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

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

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

21.2. Name of club: \_\_\_\_\_

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

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

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

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):  
\_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)  
\_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

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

---

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

---

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

Source(s) of value: \_\_\_\_\_

Who is the current owner of this asset (spouse 1, spouse 2 or both):

---

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

## 23. Other Assets

23.A. *Miscellaneous Assets* (include intellectual property (such as musical, literary, and artistic/creative works; discoveries and inventions; copyright, trademarks, patents, and so forth), 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, season tickets, ranch brands, and business names)

23.A.1. In possession of Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

23.A.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

23.B. *Digital Assets* (identify assets - anything that exists in digital form, i.e., data in the form of binary digits, including such things as e-mail addresses, social network accounts, Web sites, domain names, digital media such as pictures, music, e-books, movies, and videos, blogs, reward points, digital store-fronts, artwork, and data storage accounts)

23.B.1. In possession of Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

23.B.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value

---

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

23.C. *Virtual Assets* (identify assets - intangibles used in virtual worlds or MMORPGs (massively multiplayer online role playing games), virtual pets, avatars, accessories for characters, prizes, virtual real estate, and virtual currency)

23.C.1. In possession of Spouse 1 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
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---

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

23.C.2. In possession of Spouse 2 (attach separate sheet if necessary):

Description of Asset	Value	Source(s) of value
----------------------	-------	--------------------

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---

Will the spouse not in possession be receiving any item above? It so, please list the item to be given to the spouse not currently in possession:

---

**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: \_\_\_\_\_  
\_\_\_\_\_

Value(s) of items in safe-deposit box: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

24.2. Name of financial institution or other depository: \_\_\_\_\_

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

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

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

Value(s) of items in safe-deposit box: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

24.3. Name of financial institution or other depository: \_\_\_\_\_

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

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

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

Value(s) of items in safe-deposit box: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_  
How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

**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: \_\_\_\_\_

\_\_\_\_\_

Value(s) of items in storage unit: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

\_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

Value(s) of items in storage unit: \_\_\_\_\_



Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

25.3. Name and location: \_\_\_\_\_

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

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

\_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

Value(s) of items in storage unit: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

## 26. Community Claim for Reimbursement

26.1. Reimbursement claim against Spouse 1's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

26.2. Reimbursement claim against Spouse 2's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

**27. Contingent Assets** (e.g., lawsuits by either party against third party)

27.1. Nature of claim: \_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

27.2. Nature of claim: \_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

How is this asset to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

**28. Community Liabilities**

28.A. *Credit Cards and Charge Accounts*

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

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

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

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

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

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

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

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

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

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

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

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

<\$ \_\_\_\_\_ >

Balance as of \_\_\_\_\_ [date of separation]:

<\$ \_\_\_\_\_ >

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

28.B.1. Amount owed in any previous tax year:

<\$ \_\_\_\_\_ >

[describe liability, e.g., federal income tax/property taxes]

Source(s) of amount owed: \_\_\_\_\_

Amount owed for current year \_\_\_\_\_:

<\$ \_\_\_\_\_ >

Source(s) of amount owed: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

28.B.2. Amount owed in any previous tax year:

<\$ \_\_\_\_\_ >

[describe liability, e.g., federal income tax/property taxes]

Source(s) of amount owed: \_\_\_\_\_

Amount owed for current year \_\_\_\_\_:

<\$ \_\_\_\_\_ >

Source(s) of amount owed: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:

(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

28.C.1. Spouse 1 (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

28.C.2. Spouse 2 (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

28.D.1. Spouse 1 (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

28.D.2. Spouse 2 (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

---

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

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

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

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

Is loan evidenced in writing? [Yes/No]

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

<\$ \_\_\_\_\_ >

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

Is loan evidenced in writing? [Yes/No]

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

<\$ \_\_\_\_\_ >

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

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

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

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

Is loan evidenced in writing? [Yes/No]

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

<\$ \_\_\_\_\_ >

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

Source(s) of balance: \_\_\_\_\_

How is this debt to be awarded or divided in this divorce:  
(example: 100% to Spouse 1 or 50% to spouse 1)

\_\_\_\_\_

28.F. *Reimbursement Claims against Community Estate*

28.F.1. Reimbursement claim by Spouse 1's separate estate:

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

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

Source(s) of amount: \_\_\_\_\_

28.F.2. Reimbursement claim by Spouse 2's separate estate:

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

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

Source(s) of amount: \_\_\_\_\_

28.G. *Pledges (include charitable, church and school related)*

28.G.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: \_\_\_\_\_

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

28.H.1. Name of creditor: \_\_\_\_\_



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

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

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

Source(s) of amount: \_\_\_\_\_

28.H.2. Name of creditor: \_\_\_\_\_

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

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

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

Source(s) of amount: \_\_\_\_\_

### **Separate Estates of the Parties**

(generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury; may include real property, mineral interests, cash and financial accounts, brokerage and mutual fund accounts, stocks, bonds, other securities, stock options, bonuses, closely held business interests, retirement benefits, deferred compensation benefits, insurance and annuities, vehicles, boats, airplanes, cycles, notes receivable, household furnishings, electronics, antiques, art, miscellaneous sporting goods and firearms, jewelry and other personal items, livestock, club memberships, travel awards, miscellaneous assets, digital assets, virtual assets, and contingent assets)

### **29. Separate Assets of Spouse 1**

29.1. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

**30. Liabilities of Spouse 1's Separate Estate**

30.1. Description of liability: \_\_\_\_\_

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

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

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

Source(s) of amount: \_\_\_\_\_

30.2. Spouse 2's separate reimbursement claim against Spouse 1's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

30.3. Community estate's reimbursement claim against Spouse 1's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

**31. Separate Assets of Spouse 2**

31.1. Description of asset: \_\_\_\_\_

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

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

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

Source(s) of value: \_\_\_\_\_

31.2. Spouse 2's separate reimbursement claim against community estate:

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

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

Source(s) of value: \_\_\_\_\_

31.3. Spouse 2's separate reimbursement claim against Spouse 1's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

## **32. Liabilities of Spouse 2's Separate Estate**

32.1. Description of liability: \_\_\_\_\_

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

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

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

Source(s) of amount: \_\_\_\_\_

32.2. Spouse 1's separate property reimbursement claim against Spouse 2's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

32.3. Community estate's reimbursement claim against Spouse 2's separate estate:

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

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

Source(s) of value: \_\_\_\_\_

### Children's Property

**33. Children's Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act, 529 plans)

A. *Custodial Account under Texas Uniform Transfers to Minors Act*

33.A.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: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

33.A.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: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

33.A.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: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

33.A.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: \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

B. *529 Plan*

33.B.1. Institution or entity administering plan: \_\_\_\_\_

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

Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

33.B.2. Institution or entity administering plan: \_\_\_\_\_

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

Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

33.B.3. Institution or entity administering plan: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Type of plan: \_\_\_\_\_  
Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
Source(s) of value: \_\_\_\_\_

33.B.4. Institution or entity administering plan: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Type of plan: \_\_\_\_\_  
Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
Source(s) of value: \_\_\_\_\_

### Trust and Estate Assets

**34. Assets Held by Either Party for the Benefit of Another** (include formal and informal trusts)

34.1. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_  
Source(s) of value: \_\_\_\_\_

34.2. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

**35. Assets Held for the Benefit of Either Party as a Beneficiary** (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 \_\_\_\_\_):  
\$ \_\_\_\_\_

Source(s) of value: \_\_\_\_\_

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

Source(s) of value: \_\_\_\_\_

**Verification**

I, Spouse 1, state on oath that, to the best of my knowledge, 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.

There may be other assets and liabilities in the control of my spouse of which I am not aware as of this date, and the omission of those items from this inventory should not be construed as a waiver of my interest in them.

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Spouse 1

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

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Notary Public, State of Texas