

# INVENTORY AND APPRAISEMENT

## Community Estate of the Parties

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

1.1. Street address: \_\_\_\_\_  
County of location: \_\_\_\_\_  
Description of improvements, if any: \_\_\_\_\_  
\_\_\_\_\_  
Legal description: \_\_\_\_\_  
\_\_\_\_\_  
Current fair market value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Name of mortgage company and account number, if any: \_\_\_\_\_  
\_\_\_\_\_  
Current balance of mortgage (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Name of mortgage company and account number, if any: \_\_\_\_\_  
\_\_\_\_\_  
Current balance of mortgage (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Name of mortgage company and account number, if any: \_\_\_\_\_  
\_\_\_\_\_  
Current balance of mortgage (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Other liens against property: \_\_\_\_\_

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

**2. Cash and Accounts with Financial Institutions** (include cash, travelers checks, money orders, and accounts with commercial banks, savings and loan associations, and credit unions; exclude accounts with brokerage houses and any form of retirement account)

2.1. 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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_

2.2. Name of financial institution: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Type of account: (checking/savings/money market/certificate of deposit)\_\_\_\_  
Name(s) on withdrawal cards: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_

2.3. 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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_

2.4. 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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_

2.5. 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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_

**3. Motor Vehicles, Boats, Airplanes, Cycles, etc.** (exclude company-owned vehicles)

3.1. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

3.2. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

3.3. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

3.4. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

3.5. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_

Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current net equity in vehicle: \_\_\_\_\_ \$ \_\_\_\_\_

**4. Retirement Benefits**

4.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 § 414(l))

4.A.1. Exact name of plan: \_\_\_\_\_  
Name and address of plan administrator: \_\_\_\_\_  
Employee: \_\_\_\_\_  
Employer: \_\_\_\_\_  
Starting date of creditable service: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Account balance as of date of marriage: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current community value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Balance of loan against plan: \$ \_\_\_\_\_

4.A.2. Exact name of plan: \_\_\_\_\_  
Name and address of plan administrator: \_\_\_\_\_  
Employee: \_\_\_\_\_  
Employer: \_\_\_\_\_  
Starting date of creditable service: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Account balance as of date of marriage: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Current community value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Balance of loan against plan: \$ \_\_\_\_\_

4.B. *Defined Benefit Plan* (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula. IRC § 414(j))

4.B.1. Exact name of plan: \_\_\_\_\_  
Name and address of plan administrator: \_\_\_\_\_  
Employee: \_\_\_\_\_  
Employer: \_\_\_\_\_  
Starting date of creditable service: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Description of benefits: \_\_\_\_\_  
Current value of community interest in plan (as of \_\_\_\_\_ [date]):  
\$ \_\_\_\_\_

4.B.2. Exact name of plan: \_\_\_\_\_  
Name and address of plan administrator: \_\_\_\_\_  
Employee: \_\_\_\_\_  
Employer: \_\_\_\_\_  
Starting date of creditable service: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Description of benefits: \_\_\_\_\_  
Current value of community interest in plan (as of \_\_\_\_\_ [date]):  
\$ \_\_\_\_\_

4.C. *IRA/SEP*

4.C.1. Name of financial institution: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_  
Current community balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_

4.C.2. Name of financial institution: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
  
Designated beneficiary: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_): \$ \_\_\_\_\_  
Current community balance (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_

4.D. *Military Benefits*

4.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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Percentage of plan that is community: \_\_\_\_\_ %

4.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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Percentage of plan that is community: \_\_\_\_\_ %

4.E. *Nonqualified Plans*

4.E.1. Name of financial institution: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Account balance as of date of marriage: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Current value of community interest in plan (as of \_\_\_\_\_ [date]):  
\$ \_\_\_\_\_

4.E.2. Name of financial institution: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Account balance as of date of marriage: \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_

Current value of community interest in plan (as of \_\_\_\_\_[date]):  
\$ \_\_\_\_\_

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

4.F.1. Name of plan:

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

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

Account balance as of date of marriage: \_\_\_\_\_

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

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

Current value of community interest in plan (as of \_\_\_\_\_[date]):

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

4.F.2. Name of plan:

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

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

Account balance as of date of marriage: \_\_\_\_\_

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

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

Current value of community interest in plan (as of \_\_\_\_\_[date]):

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

**5. Other Deferred Compensation Benefits** (e.g., workers' compensation, disability benefits, bonuses and other "special payments," employee stock options, and other forms of compensation)

5.1. Husband

Description of Asset

Value

5.2. Wife

Description of Asset

Value

**6. Insurance and Annuities**

6.A. *Life Insurance*

6.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: \$ \_\_\_\_\_

6.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: \$ \_\_\_\_\_

6.B. *Annuities*

6.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: \_\_\_\_\_  
Value on date of marriage: \_\_\_\_\_  
Current value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Balance of loan against policy: \$ \_\_\_\_\_

6.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: \_\_\_\_\_



Value on date of marriage: \_\_\_\_\_  
Current value (as of \_\_\_\_\_[date]): \_\_\_\_\_ \$ \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Balance of loan against policy: \$ \_\_\_\_\_

**7. Brokerage/Mutual Fund Accounts** (include accounts not previously disclosed in this inventory)

7.1. Name of brokerage firm: \_\_\_\_\_  
Address of brokerage firm: \_\_\_\_\_  
Name account held in: \_\_\_\_\_  
Name of account (and subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Account number (and numbers of subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Community value of each account (and subaccounts if any)  
(as of \_\_\_\_\_[date]): \_\_\_\_\_ \$ \_\_\_\_\_

7.2. Name of brokerage firm: \_\_\_\_\_  
Address of brokerage firm: \_\_\_\_\_  
Name account held in: \_\_\_\_\_  
Name of account (and subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Account number (and numbers of subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Community value of each account (and subaccounts if any)  
(as of \_\_\_\_\_[date]): \_\_\_\_\_ \$ \_\_\_\_\_

7.3. Name of brokerage firm: \_\_\_\_\_  
Address of brokerage firm: \_\_\_\_\_  
Name account held in: \_\_\_\_\_  
Name of account (and subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Account number (and numbers of subaccounts if any): \_\_\_\_\_  
\_\_\_\_\_  
Community value of each account (and subaccounts if any)  
(as of \_\_\_\_\_[date]): \_\_\_\_\_ \$ \_\_\_\_\_

**8. Publicly Traded Stocks, Bonds, and Other Securities** (include securities not previously disclosed in this inventory)

8.1. Name of security: \_\_\_\_\_  
Number of shares: \_\_\_\_\_  
Type of security: [common stock/preferred stock/bond/other security]: \_\_\_\_\_  
Certificate numbers: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Current market value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Name of exchange on which listed: \_\_\_\_\_  
Pledged as collateral? [Yes/No]

8.2. Name of security: \_\_\_\_\_  
Number of shares: \_\_\_\_\_  
Type of security: [common stock/preferred stock/bond/other security]: \_\_\_\_\_  
Certificate numbers: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Current market value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Name of exchange on which listed: \_\_\_\_\_  
Pledged as collateral? [Yes/No]

**9. Closely Held Business Interests** (include sole proprietorships, professional practices, partnerships, joint ventures, and other nonpublicly traded corporate business entities, and so forth)

9.1. Name of business: \_\_\_\_\_  
Address: \_\_\_\_\_  
Type of business organization: \_\_\_\_\_  
Percentage of ownership: \_\_\_\_\_  
Number of shares owned (if applicable): \_\_\_\_\_  
Value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Balance of accounts receivable if on cash accounting basis: \$ \_\_\_\_\_  
Balance of liabilities if on cash accounting basis: <\$ \_\_\_\_\_ >

**10. 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)

10.1. 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 \_\_\_\_\_ [date]): \$ \_\_\_\_\_

10.2. 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 \_\_\_\_\_[date]):

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

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

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

Description and value of each item in possession of husband: \_\_\_\_\_

---

---

---

---

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

Description and value of each item in possession of wife: \_\_\_\_\_

---

---

---

---

**12. Electronics and Computers**

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

Description and value of each item in possession of husband: \_\_\_\_\_

---

---

---

---

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

Description and value of each item in possession of wife: \_\_\_\_\_

---

---

---

---

**13. Antiques, Artwork, and Collections** (include any works of art, such as paintings, tapestry, rugs, and coin or stamp collections)

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

Description and value of each item in possession of husband: \_\_\_\_\_

---

---

---

---

13.2. In possession of wife (attach separate sheet if necessary):  
Description and value of each item in possession of wife: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**14. Miscellaneous Sporting Goods and Firearms**

14.1. In possession of husband (attach separate sheet if necessary):  
Description and value of each item in possession of husband: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14.2. In possession of wife (attach separate sheet if necessary):  
Description and value of each item in possession of wife: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**15. Jewelry and Other Personal Items**

15.1. In possession of husband (attach separate sheet if necessary):  
Description and value of each item in possession of husband: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

15.2. In possession of wife (attach separate sheet if necessary):  
Description and value of each item in possession of wife: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

16.1. In possession of husband (attach separate sheet if necessary):  
Description and value of each item in possession of husband: \_\_\_\_\_

---

---

---

---

16.2. In possession of wife (attach separate sheet if necessary):  
Description and value of each item in possession of wife: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**17. Club Memberships**

17.1. Name of club: \_\_\_\_\_  
Name membership held in: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Current value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Method of valuation: \_\_\_\_\_

17.2. Name of club: \_\_\_\_\_  
Name membership held in: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Current value (as of \_\_\_\_\_ [date]): \$ \_\_\_\_\_  
Method of valuation: \_\_\_\_\_

**18. Travel Award Benefits** (include frequent-flyer mileage accounts)

18.1. Name of airline: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Current number of miles (as of \_\_\_\_\_ [date]): \_\_\_\_\_  
Value (if any): \$ \_\_\_\_\_

18.2. Name of airline: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Current number of miles (as of \_\_\_\_\_ [date]): \_\_\_\_\_  
Value (if any): \$ \_\_\_\_\_

**19. Miscellaneous Assets** (intellectual property, licenses, crops, cemetery lots, gold or silver coins not part of a collection described elsewhere in this inventory, tax overpayments, loss carry-forward deductions)

19.1. In possession of husband (attach separate sheet if necessary):  
Description and value of each item in possession of husband: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
19.2. In possession of wife (attach separate sheet if necessary):  
Description and value of each item in possession of wife: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**20. Community Claim for Reimbursement**

20.1. Reimbursement claim against husband's separate estate:  
Basis of claim: \_\_\_\_\_  
Amount claimed: \$ \_\_\_\_\_

20.2. Reimbursement claim against wife's separate estate:  
Basis of claim: \_\_\_\_\_  
Amount claimed: \$ \_\_\_\_\_

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

21.1. Nature of claim: \_\_\_\_\_  
Amount of claim: \$ \_\_\_\_\_

21.2. Nature of claim: \_\_\_\_\_  
Amount of claim: \$ \_\_\_\_\_

**22. Community Liabilities**

22.A. *Credit Cards and Charge Accounts*

1. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]: <\$ \_\_\_\_\_ >
  
2. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]: <\$ \_\_\_\_\_ >

3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]: <\$ \_\_\_\_\_ >

4. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]: <\$ \_\_\_\_\_ >

5. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]: <\$ \_\_\_\_\_ >

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

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

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

22.C.1. Husband (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
22.C.2. Wife (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >

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

22.D.1. Husband (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
22.D.2. Wife (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >

22.E. *Other Liabilities Not Otherwise Listed in This Inventory* (e.g., loans, margin accounts)

22.E.1. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No]  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >

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

22.E.2. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No] \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Security, if any: \_\_\_\_\_

22.E.3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No] \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >  
Security, if any: \_\_\_\_\_

22.F. *Reimbursement Claims against Community Estate*

22.F.1. Reimbursement claim by husband's separate estate against  
community estate:  
Value (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >

22.F.2. Reimbursement claim by wife's separate estate against  
community estate:  
Value (as of \_\_\_\_\_ [date]): <\$ \_\_\_\_\_ >

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

22.G.1. Name of creditor: \_\_\_\_\_  
Name of person primarily liable: \_\_\_\_\_  
Amount of contingent liability: <\$ \_\_\_\_\_ >  
Nature of contingency: \_\_\_\_\_

22.G.2. Name of creditor: \_\_\_\_\_  
Name of person primarily liable: \_\_\_\_\_  
Amount of contingent liability: <\$ \_\_\_\_\_ >  
Nature of contingency: \_\_\_\_\_

**Separate Estates of the Parties**

**23. 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)



- 23.1. Description of asset: \_\_\_\_\_  
 Date property acquired: \_\_\_\_\_  
 How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_  
 \_\_\_\_\_  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_
- 23.2. Husband's separate reimbursement claim against community estate:  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_
- 23.3. Husband's separate reimbursement claim against wife's separate estate:  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

**24. Liabilities of Husband's Separate Estate**

- 24.1. Description of liability: \_\_\_\_\_  
 Date of liability: \_\_\_\_\_  
 How liability acquired: \_\_\_\_\_  
 Amount of liability (as of [date]): <\$ \_\_\_\_\_ >
- 24.2. Wife's separate reimbursement claim against husband's separate estate:  
 Value (as of \_\_\_\_\_[date]): <\$ \_\_\_\_\_ >
- 24.3. Community estate's reimbursement claim against husband's separate estate:  
 Value (as of \_\_\_\_\_[date]): <\$ \_\_\_\_\_ >

**25. 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)

- 25.1. Description of asset: \_\_\_\_\_  
 Date property acquired: \_\_\_\_\_  
 How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_  
 \_\_\_\_\_  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_
- 25.2. Wife's separate reimbursement claim against community estate:  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_
- 25.3. Wife's separate reimbursement claim against husband's separate estate:  
 Value (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

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

- 26.1. Description of liability:  
Date of liability: \_\_\_\_\_  
How liability acquired: \_\_\_\_\_  
Amount of liability (as of \_\_\_\_\_[date]): <\$ \_\_\_\_\_ >
- 26.2. Husband's separate reimbursement claim against wife's separate estate:  
Value (as of \_\_\_\_\_[date]): <\$ \_\_\_\_\_ >
- 26.3. Community estate's reimbursement claim against wife's separate estate:  
Value (as of \_\_\_\_\_[date]): <\$ \_\_\_\_\_ >

**Child's Property**

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

- 27.1. Name of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_
- 27.2. Name of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_
- 27.3. Name of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_
- 27.4. Name of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_[date]): \$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_

**28. Child's Other Property** (e.g., property other than custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act)

28.1. Description of Asset: \_\_\_\_\_

Value of the asset:(as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

Name of minor for whom asset is held: \_\_\_\_\_

28.2. Description of Asset: \_\_\_\_\_

Value of the asset:(as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

Name of minor for whom asset is held: \_\_\_\_\_

28.3. Description of Asset: \_\_\_\_\_

Value of the asset:(as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

Name of minor for whom asset is held: \_\_\_\_\_

28.4. Description of Asset: \_\_\_\_\_

Value of the asset:(as of \_\_\_\_\_[date]): \$ \_\_\_\_\_

Name of minor for whom asset is held: \_\_\_\_\_

**Trust and Estate Assets**

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

29.1. 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 \_\_\_\_\_[date]): \$ \_\_\_\_\_

29.2. 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 \_\_\_\_\_[date]): \$ \_\_\_\_\_

29.3. 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 \_\_\_\_\_ [date]): \_\_\_\_\_ \$ \_\_\_\_\_

**30. Assets Held for the Benefit of Either Party as a Beneficiary** (include formal and informal trusts)

30.1. 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 \_\_\_\_\_ [date]): \_\_\_\_\_ \$ \_\_\_\_\_