

INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT

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 appraisalment 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 BY _____. 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.

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 of the property 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.

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

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

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.

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.

Inventory and Appraisement.

Community Estate of the Parties

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

Margin loan balance (as of _____):

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

4.3. Name of brokerage firm/mutual fund: _____

Address of brokerage firm/mutual fund: _____

Name account held in: _____

Name of account (and subaccounts if any): _____

Account number (and numbers of subaccounts if any):

Margin loan balance (as of _____):

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

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

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]

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 |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

18. Miscellaneous Sporting Goods and Firearms

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

| Description of Asset | Value |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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

| Description of Asset | Value |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

19. Jewelry and Other Personal Items

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

| Description of Asset | Value |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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

| Description of Asset | Value |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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

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

| Description of Asset | Value |
|----------------------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

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: _____

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: _____

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:

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: _____

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

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 _____):
<\$ _____>

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 _____): \$ _____

33. Liabilities of Wife's Separate Estate

33.1. Description of liability: _____

Date of liability: _____

How liability acquired: _____

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

Child[ren]'s Property

34. Child[ren]'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: _____

Trust and Estate Assets

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

[subnumber]. 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 _____):
\$ _____