

# INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT FORM

CLIENT'S NAME: \_\_\_\_\_  
DUE DATE: \_\_\_\_\_

This "inventory" is most important. We need to start working on it immediately. The inventory is the road map for your case. We cannot divide the property without exchanging information in this form—what you and your spouse own- whether the asset or debt was acquired prior to or during the marriage, how much the asset is worth and what current debt there is -- this is needed. So, please start working on this form and remember, it is an inventory of both your holdings and your spouses' holdings---even if you are unaware of the value.

## 1. General Instructions—don't share!!!

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 we talk about it beforehand. Do not let anyone see this document. This preparation of your Inventory and Appraisal 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. Especially when it comes to questions of the present value of property, you should make your own independent estimate.

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

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.

## 2. Property Division

In addition to factual data, I need to know your desires about division of property. Please indicate your desires 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. If you do not yet have an opinion, that is fine--

## 3. Definitions

a. **Separate Property** - Property acquired by a spouse before marriage and property a spouse acquired individually by gift or inheritance during marriage are considered to be separate property of that spouse. If you or your spouse have any property you think is separate property, complete the sections marked "Separate Estate of Husband" and "Separate Estate of Wife." If you or your spouse bought property before marriage, but have not paid it off, it is still separate property. This situation is common, and we will discuss.

- b. **Community Property** - All property that is not separate property is community property.
- c. **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. Remember, all real property has a value according to the tax rolls. This value is usually less than fair market value, but it is a good starting place. Furniture and electronics are rarely worth what you paid for them, so again, use the cost as a starting point.
- d. IT IS VERY IMPORTANT THAT YOU DO NOT ATTEMPT TO CALCULATE ANY OF THE REIMBURSEMENT CLAIMS OR THE ANY CLAIM SUCH AS AN ECONOMIC CONTRIBUTION CLAIM. WE WILL REVIEW THE INVENTORY AND, DEPENDING ON WHETHER YOU HAD/HAVE SOME PROPERTY ACQUIRED PRIOR TO MARRIAGE, WE WILL ANALYZE THE CLAIM WITH YOU. SIMPLY FILL OUT THE FORM WITH YOUR BEST INFORMATION.

#### 4. **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 for Inventory and Appraisalment If an asset has a title document (deed, deed of trust, certificate of title to motor vehicle) return a copy with this preparation for Inventory and Appraisalment.

If an asset has any document that can clearly identify it, return a copy with this preparation for Inventory and Appraisalment.

Here is a checklist of copies of items you should return with this preparation for Inventory and Appraisalment.

- a. Financial institution statements (whether in your name or spouse);
- b. Bank statements;
- c. Keogh statements;
- d. IRA statements;
- e. SEP statements;
- f. Certificate of deposit statements;
- g. Company retirement benefits statements of account;
- h. Life insurance policies and premium notices;
- I. Broker statements;
- j. Deeds;
- k. Deeds of trust;
- l. Mortgage company payment coupon books (usually one page is enough);
- m. Certificates of title to motor vehicles;
- n. Stocks;
- o. Last statement from each creditor;
- p. Any other document that may lead to the discovery of assets or liabilities.

**5. Full Disclosure**

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

**VERIFICATION**

"I have read these instructions and I understand them. I represent that I will do my best to list and identify all the community and separate property assets and liabilities"

---

**CLIENT'S SIGNATURE**

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**CLIENT QUESTIONNAIRE - Inventory and Appraisement.**

**COMMUNITY ESTATE OF THE PARTIES**

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

1.1. Street address: \_\_\_\_\_

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

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

Legal description: (Please provide deed or deed of trust for this information):

Date of purchase, source and amount of down payment:  
\_\_\_\_\_

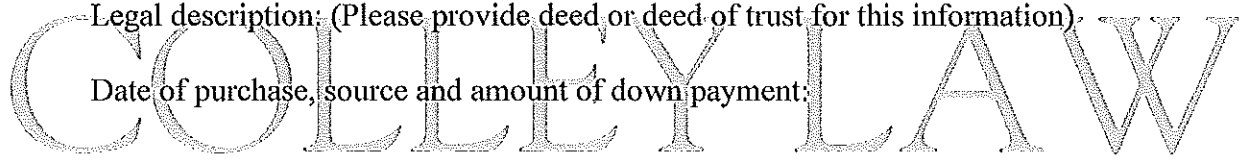
Name of mortgage company and account number, if any:  
\_\_\_\_\_

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

Other liens against property: \_\_\_\_\_

Was this property ever refinanced? If yes, when and provide any other information you have about the refinance:

\_\_\_\_\_  
\_\_\_\_\_



1.2. Street address: \_\_\_\_\_

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

Description of improvements, if any:

\_\_\_\_\_  
\_\_\_\_\_

Legal description: (Please provide deed or deed of trust for this information)

Date of purchase, source and amount of down payment:

\_\_\_\_\_

Name of mortgage company and account number, if any:

\_\_\_\_\_

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

Other liens against property: \_\_\_\_\_

Was this property ever refinanced? If yes, when and provide any other information you have about the refinance:

\_\_\_\_\_  
\_\_\_\_\_

**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

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 needed from official document

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

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

Value on date of marriage: \$ \_\_\_\_\_

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

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

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

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

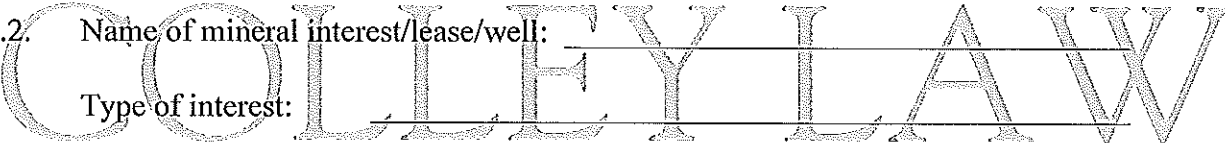
Legal description needed from official document

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

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

Value on date of marriage: \$ \_\_\_\_\_

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



**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) **this list of accounts should include any account that you or your spouse may have, whether a joint account or not**

3.1. Cash on hand including travelers checks and money orders: \_\_\_\_\_

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

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

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

Date account opened: \_\_\_\_\_

Type of account:    checking        savings        money market        cert of deposit

Name(s) on withdrawal cards:

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

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

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

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

Date account opened: \_\_\_\_\_

Type of account:    checking        savings        money market        cert of deposit

Name(s) on withdrawal cards:

\_\_\_\_\_

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

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

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

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

Date account opened: \_\_\_\_\_

Type of account:    checking        savings        money market        cert of deposit

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

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

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

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

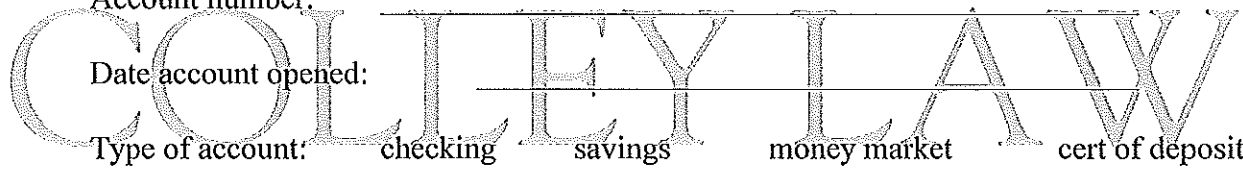
Account number: \_\_\_\_\_

Date account opened: \_\_\_\_\_

Type of account:    checking        savings        money market        cert of deposit

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

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



**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

**4. Brokerage/Mutual Fund Accounts (regardless of which spouse may be on the title of account)**

4.1. Name of brokerage firm/mutual fund:

\_\_\_\_\_

Address of brokerage firm/mutual fund:

\_\_\_\_\_

Name account held in:

\_\_\_\_\_

Name of account and account number (and subaccounts if any):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

Value of each account and subaccounts if any (on date of marriage):

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Value of each account and subaccounts if any (as of \_\_\_\_\_ date):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tax basis of each security held (if you know):

\_\_\_\_\_

\_\_\_\_\_

4.2. Name of brokerage firm/mutual fund:

\_\_\_\_\_

Address of brokerage firm/mutual fund:

\_\_\_\_\_

Name account held in:

\_\_\_\_\_

Name of account and account number (and subaccounts if any):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

Value of each account and subaccounts if any (on date of marriage:)

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\_\_\_\_\_

Value of each account and subaccounts if any(as of \_\_\_\_\_ date):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tax basis of each security held (if you know):

\_\_\_\_\_

\_\_\_\_\_

4.3. Name of brokerage firm/mutual fund:

\_\_\_\_\_

Address of brokerage firm/mutual fund:

\_\_\_\_\_

Name account held in:

\_\_\_\_\_

Name of account and account number (and subaccounts if any):

\_\_\_\_\_

\_\_\_\_\_

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

Value of each account and subaccounts if any (on date of marriage:)

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\_\_\_\_\_

Value of each account and subaccounts if any(as of \_\_\_\_\_ date):

\_\_\_\_\_

\_\_\_\_\_

Tax basis of each security held (if you know):

\_\_\_\_\_

\_\_\_\_\_

**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

**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 held on date of marriage: \_\_\_\_\_

Number of shares currently held: \_\_\_\_\_

Type of security:    common stock            preferred stock            bond            other

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

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

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

Pledged as collateral?            Yes            No

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

Market value on date of marriage:    \$ \_\_\_\_\_

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

5.2. Name of security: \_\_\_\_\_

Number of shares held on date of marriage: \_\_\_\_\_

Number of shares currently held: \_\_\_\_\_

Type of security:    common stock            preferred stock            bond            other

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

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

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

Pledged as collateral?            Yes            No

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

Market value on date of marriage:    \$ \_\_\_\_\_

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

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

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

**7. Bonuses**

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

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

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

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

History of Bonuses: \_\_\_\_\_

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

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

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

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

History of Bonuses: \_\_\_\_\_

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

Date of organization: \_\_\_\_\_

Percentage of ownership: \_\_\_\_\_

Names of other owners: \_\_\_\_\_

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

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

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

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

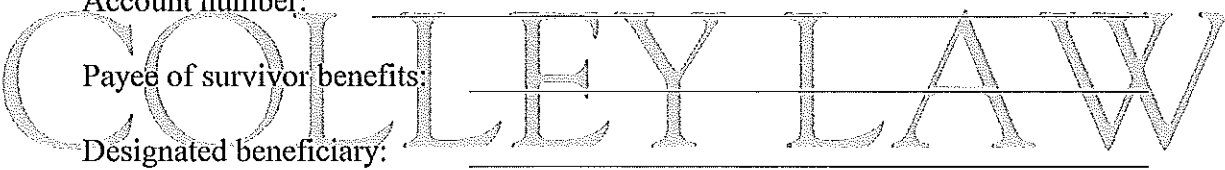
Account balance on date of marriage: \$ \_\_\_\_\_

Balance of loan against plan on date of marriage: \$ \_\_\_\_\_

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

Balance of loan against plan (as of \_\_\_\_\_ date): \$ \_\_\_\_\_

Loan was used for: \_\_\_\_\_



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

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

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

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

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

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

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

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

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

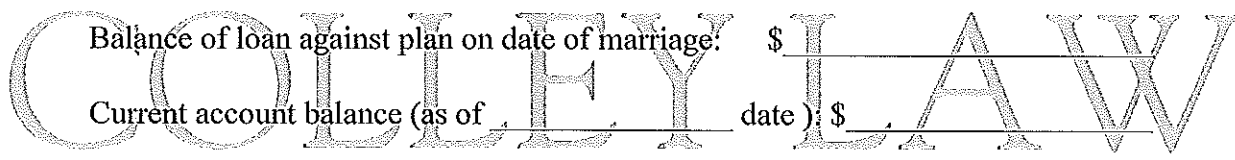
Account balance on date of marriage: \$ \_\_\_\_\_

Balance of loan against plan on date of marriage: \$ \_\_\_\_\_

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

Balance of loan against plan (as of \_\_\_\_\_ date): \$ \_\_\_\_\_

Loan was used for: \_\_\_\_\_



**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

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 interest in plan on date of marriage: \$ \_\_\_\_\_

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

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 interest in plan on date of marriage: \$ \_\_\_\_\_

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

9.C. IRA/SEP (regardless of name)

9.C.1. Name of financial institution: \_\_\_\_\_

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

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

Date account opened: \_\_\_\_\_

Source of funds: \_\_\_\_\_

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

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

Account balance on date of marriage: \$ \_\_\_\_\_

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

9.C.2. Name of financial institution: \_\_\_\_\_

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

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

Date account opened: \_\_\_\_\_

Source of funds: \_\_\_\_\_

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

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

Account balance on date of marriage: \$ \_\_\_\_\_

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

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**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**



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

9.F.1. Name of plan: \_\_\_\_\_

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

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

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

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

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

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

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

9.F.2. Name of plan: \_\_\_\_\_

Account name: COLLEYLAW  
Account number: COLLEYLAW

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

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

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

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

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

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

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**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 (as of \_\_\_\_\_ date) \$ \_\_\_\_\_

Balance of loan against policy on date of marriage: \$ \_\_\_\_\_

12.A.2. Name of insurance company: \_\_\_\_\_

Policy number: \_\_\_\_\_

Name of insured: \_\_\_\_\_

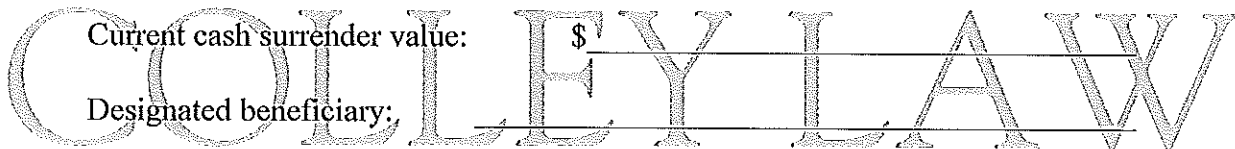
Name of owner: \_\_\_\_\_

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 (as of \_\_\_\_\_ date) \$ \_\_\_\_\_

Balance of loan against policy on date of marriage: \$ \_\_\_\_\_

12.A.3. 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: \_\_\_\_\_

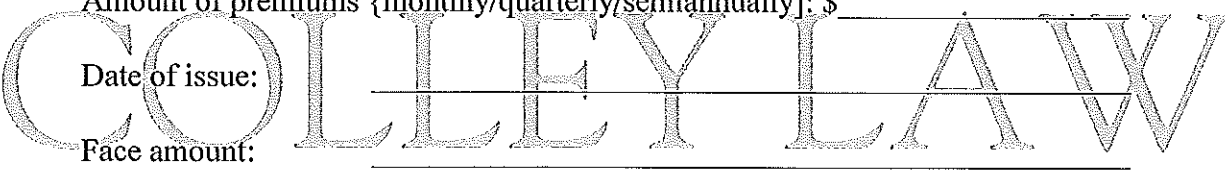
Cash surrender value on date of marriage: \$ \_\_\_\_\_

Current cash surrender value: \$ \_\_\_\_\_

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

Balance of loan against policy (as of \_\_\_\_\_ date) \$ \_\_\_\_\_

Balance of loan against policy on date of marriage: \$ \_\_\_\_\_



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

Balance of loan against policy (as of \_\_\_\_\_ date): \$ \_\_\_\_\_

Balance of loan against policy on date of marriage: \$ \_\_\_\_\_

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

Date of purchase: \_\_\_\_\_

Source of funds: \_\_\_\_\_

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

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

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

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

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

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

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

Name on certificate of title: \_\_\_\_\_

Date of purchase: \_\_\_\_\_

Source of funds: \_\_\_\_\_

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

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

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

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

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

13.3. Year: \_\_\_\_\_ Make \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
Date of purchase: \_\_\_\_\_  
Source of funds: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ date): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

13.4. Year: \_\_\_\_\_ Make \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
Date of purchase: \_\_\_\_\_  
Source of funds: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_ date): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_

**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

**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

Date debt was incurred: \_\_\_\_\_

Total amount of debt owed at date of incursion:    \$ \_\_\_\_\_

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

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

15.1. In possession of husband – attach separate sheet by room, listing all items and values

15.2. In possession of wife – attach separate sheet by room, listing all items and values

**16. Electronics and Computers**

16.1. In possession of husband – attach separate sheet by room, listing all items and values

16.2. In possession of wife – attach separate sheet by room, listing all items and values

**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 by room, listing all items and values

17.2. In possession of wife – attach separate sheet by room, listing all items and values

**18. Miscellaneous Sporting Goods and Firearms**

18.1. In possession of husband – attach separate sheet by room, listing all items and values

18.2. In possession of wife – attach separate sheet by room, listing all items and values

**19. Jewelry and Other Personal Items**

19.1. In possession of husband – attach separate sheet, listing all items and values

19.2. In possession of wife – attach separate sheet, listing all items and values

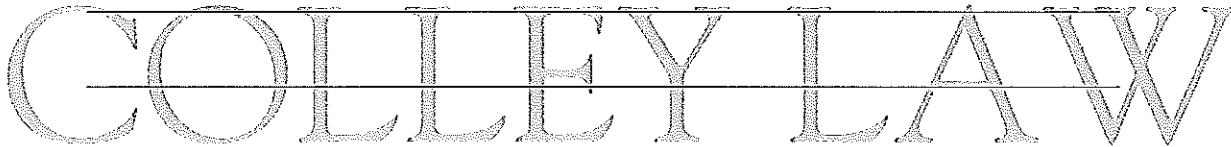
**20. Livestock (include cattle, horses, and so forth)**

20.1. In possession of husband

Description of Asset	Value
_____	
_____	

20.2. In possession of wife

Description of Asset	Value
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**21. Club Memberships**

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

Date membership was obtained: \_\_\_\_\_

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

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

Cost of the membership: \$ \_\_\_\_\_

Value at the time of purchase: \$ \_\_\_\_\_

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

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

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

22.1. Name of airline: \_\_\_\_\_  
Account number and name on account: \_\_\_\_\_  
Date account was opened: \_\_\_\_\_  
Number of miles of the date of marriage: \_\_\_\_\_  
Current number of miles (as of \_\_\_\_\_ date): \$ \_\_\_\_\_  
Current value (if any): \$ \_\_\_\_\_

22.2. Name of airline: \_\_\_\_\_  
Account number and name on account: \_\_\_\_\_  
Date account was opened: \_\_\_\_\_  
Number of miles of the date of marriage: \_\_\_\_\_  
Current number of miles (as of \_\_\_\_\_ date): \$ \_\_\_\_\_  
Current 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: \_\_\_\_\_

Date box was obtained: \_\_\_\_\_

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

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

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

\_\_\_\_\_

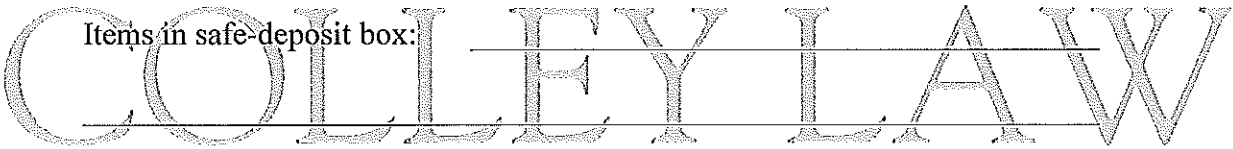
24.2. Name of financial institution or other depository: \_\_\_\_\_

Date box was obtained: \_\_\_\_\_

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

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

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



**25. Storage Facilities**

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

Date facility was obtained: \_\_\_\_\_

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

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

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

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

\_\_\_\_\_

**26. Claims Associated with Real Estate**

There may be some claims associated with real estate. **Please complete a separate answer sheet for each piece of property (unless the property was purchased after the date of marriage).**

1. What is the fair market value of the home?     \$ \_\_\_\_\_
2. What is the principal amount of the debt?     \$ \_\_\_\_\_
3. What was the principle debt amount on the date of the first economic contribution?  
\$ \_\_\_\_\_
4. Was the home refinanced?           Yes    No

If so, how many times was the home refinanced? \_\_\_\_\_  
If no, skip to question no. 5.

Date of refi and What was the amount of the debt on the date of the first refinancing?  
\_\_\_\_\_ \$ \_\_\_\_\_

Date of refi and what was the amt of the debt on the date of the second refinancing?  
\_\_\_\_\_ \$ \_\_\_\_\_

5. Were capital improvements made to the home?           Yes    No  
If Yes, explain: \_\_\_\_\_  
\_\_\_\_\_

What was the principle debt amount on the date of the capital improvement?  
\_\_\_\_\_

What was the amount of the debt incurred for the capital improvement?  
\$ \_\_\_\_\_

What was the date of the capital improvement? \_\_\_\_\_

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

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

Date of claim: \_\_\_\_\_

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

Any other details: \_\_\_\_\_

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

Date of claim: \_\_\_\_\_

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

Any other details: \_\_\_\_\_

**28. Community Liabilities**

**28.A. Credit Cards and Charge Accounts**

28.A.1. Name of creditor: COLLEY LAW  
Account number: \_\_\_\_\_

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

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

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

What were funds used for: \_\_\_\_\_

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

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

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

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

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

What were funds used for: \_\_\_\_\_

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

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

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

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

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

What were funds used for: \_\_\_\_\_

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

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

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

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

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

What were funds used for: \_\_\_\_\_

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

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

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

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

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

What were funds used for: \_\_\_\_\_

28.A.6. Name of creditor: \_\_\_\_\_

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

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

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

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

What were funds used for: \_\_\_\_\_

COLLEY LAW

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

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

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

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

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

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

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

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

28.C.1. Husband (as of \_\_\_\_\_): \$ \_\_\_\_\_

28.C.2. Wife (as of \_\_\_\_\_): \$ \_\_\_\_\_

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

28.D.1. Husband (as of \_\_\_\_\_): \$ \_\_\_\_\_

Describe: COLLEY LAW

28.D.2. Wife (as of \_\_\_\_\_): \$ \_\_\_\_\_

Describe: \_\_\_\_\_

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: \_\_\_\_\_

Reason incurred: \_\_\_\_\_

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: \_\_\_\_\_

Reason incurred: \_\_\_\_\_

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: \_\_\_\_\_

Reason incurred: \_\_\_\_\_

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

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

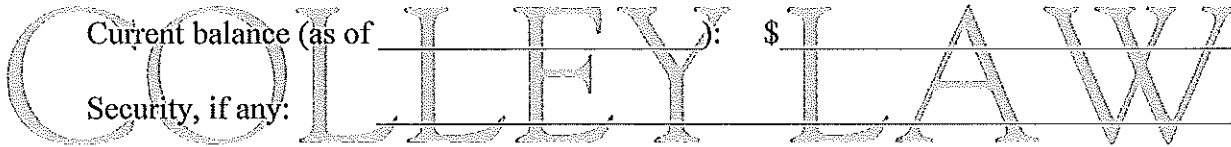
Date of pledge: \_\_\_\_\_

Total amount of pledge: \_\_\_\_\_

Is pledge payable in installments? Yes No

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

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



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

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

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

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

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

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

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

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

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

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

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

**COLLEY LAW**  
ANYTHING ELSE YOU OR YOUR SPOUSE HAVE (ASSET OR DEBT) THAT IS NOT LISTED  
- GIVE DETAILS HERE:

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**SEPARATE ESTATES OF THE PARTIES**

**29. 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)

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

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

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

\_\_\_\_\_

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

29.2. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

29.3. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

29.4. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

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

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

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

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

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

What were funds used for: \_\_\_\_\_

30.2. Description of liability: \_\_\_\_\_

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

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

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

What were funds used for: \_\_\_\_\_

30.3. Description of liability: \_\_\_\_\_

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

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

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

What were funds used for: \_\_\_\_\_

**31. 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)**

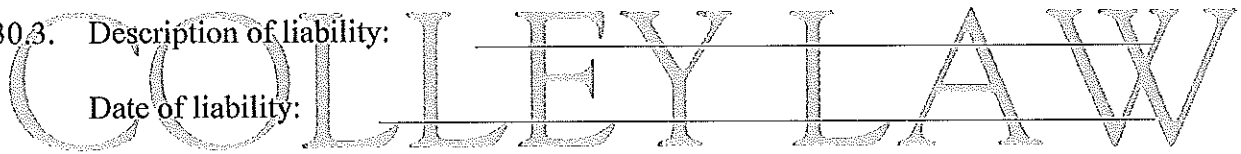
31.1. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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



31.2. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

31.3. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

31.4. Description of asset: \_\_\_\_\_

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

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

\_\_\_\_\_

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

**FEEL FREE TO ADD ADDITIONAL PAGES IF NECESSARY...**

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

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

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

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

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

What were funds used for: \_\_\_\_\_

32.2. Description of liability: \_\_\_\_\_

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

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

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

What were funds used for: \_\_\_\_\_

32.3. Description of liability: \_\_\_\_\_

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

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

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

What were funds used for: \_\_\_\_\_

COLLEY LAW  
ANYTHING ELSE YOU ARE CONCERNED ABOUT OR THAT SHOULD BE NOTED  
REGARDING SEPARATE PROPERTY - GIVE DETAILS HERE:

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**CHILD[REN]'S PROPERTY**

**33. Child[ren]'s Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act, vehicles, college accounts, etc...)

33.1. Description: \_\_\_\_\_

Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_

33.2. Description: \_\_\_\_\_

Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_

33.3. Description: \_\_\_\_\_

Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_

33.4. Description: \_\_\_\_\_

Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_

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

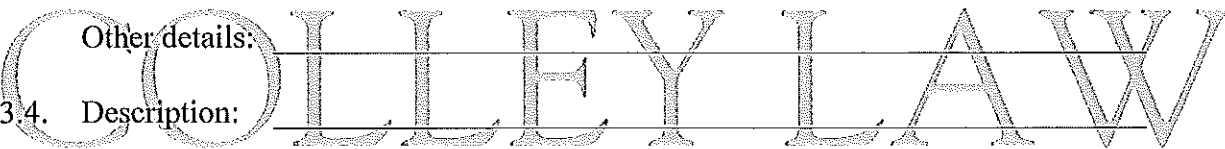
Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_

33.6. Description: \_\_\_\_\_

Name of minor belonging to: \_\_\_\_\_

Other details: \_\_\_\_\_



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

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

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

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

