

ATTORNEY/CLIENT-PRIVILEGED INFORMATION

Client Name: _____

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 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.

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 - Property acquired by a spouse before marriage and property a spouse acquired individually during marriage by gift or inheritance or as a result of personal injury are considered to be separate property of that spouse. If either you or your spouse has any property you think is separate property, complete the section marked "Separate Estates of the Parties."

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

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

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

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.

Closing Documents

In preparing the closing documents relating to your divorce, deeds may need to be prepared, executed, and filed with the clerk's office of the county in which the property is located to effect the transfer of ownership.

If property is to be conveyed to you, you have the right to have a title policy issued with

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regard to each such conveyance or to have a title search or abstract letter issued. This office does not issue title policies, nor do we prepare abstracts or conduct title searches related to the conveyance of real estate or to secure obligations created in divorce documents.

In preparing any real estate documents in your divorce, we rely solely on information you provide us about the ownership of property, legal descriptions, existing liens, encumbrances, or other restrictions that may affect the conveyance of title.

If you wish to have a title policy issued or a title search performed or abstract prepared, please advise me in writing, and I will be happy to refer this aspect of the closing documents relating to your case to a title company. You may also consult with a title company of your choice or an abstract attorney. You will need to arrange the payment of their charges directly with the title company.

Please advise this office, in writing, if you desire to have a title search, abstract letter, or title policy issued, or any other research done with regard to the real estate closing documents that may need to be prepared to conclude your case.

Full Disclosure

Finally, I will rely on this Preparation of Inventory and Appraisal 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.

1. Real Estate

1.1 Home Owned:

Street address: _____

County of location: _____

Description of improvements, if any: _____

Date improvements made: _____

Cost of improvements: _____

Balance owed, if any, on cost of improvements: \$ _____

Source of money for improvements: _____

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Legal description: _____

Current fair market value: \$ _____ as of _____

Exact name of mortgage company and account number, if any: _____

Current balance of mortgages: \$ _____

a. Purchase mortgage

Name of lienholder: _____

Current balance of lien: \$ _____ as of _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

b. Second lien (pools, etc.)

Name of second lienholder: _____

Current balance of second lien: \$ _____ as of _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

c. Third lien (decrees)

Name of third lienholder: _____

Current balance of third lien: \$ _____ as of _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

Current net equity in property: _____

Date property was acquired: _____

Amount of purchase price: \$ _____

Down payment and source of down payment: _____

Exact name on title: _____

Who lives in the house now? _____

Who wishes to live in the house after the divorce? _____

Comments: _____

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1.2 Home Not Owned:

Address of dwelling: _____

General description of dwelling: _____

Furnished? _____

When did you move in? _____

Who owns the property? _____

Address: _____

Phone: _____

Rent amount: \$ _____ Due date: _____

Are utilities included? _____ Is rent current now? _____

How long is the term of lease? _____

Written lease signed? _____

Did you put up a deposit? _____ How much? \$ _____

How much notice to terminate lease? _____

1.3 Other Real Estate:

General description: _____

Location: _____

Description of improvements, if any: _____

Date improvements made: _____

Cost of improvements: _____

Balance owed, if any, on cost of improvements: \$ _____

Source of money for improvements: _____

Legal description: _____

Other owners: _____

Date acquired: _____ Total cost: \$ _____

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Amount of purchase price: \$ _____

Record title owner: _____

Down payment and source of down payment: _____

First lienholder: _____

Address: _____

Amount of payment: \$ _____ Due date: _____ Interest rate: _____

Balance due: \$ _____ as of _____

2. Mineral Interests

a. Name of mineral interest/lease/well: _____

Type of interest: _____

County of location: _____

Legal description: _____

Name of producer or operator: _____

Current value: _____

b. Name of mineral interest/lease/well: _____

Type of interest: _____

County of location: _____

Legal description: _____

Name of producer or operator: _____

Current value: _____

3. Cash and Accounts with Financial Institutions

(Include cash, traveler's checks, money orders, and accounts with commercial banks, savings and loan associations, and credit unions; exclude accounts with brokerage houses and all retirement accounts.)

3.1 Checking Accounts:

a. Name of financial institution: _____

Address: _____

Account officer: _____

Account number: _____

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Account name: _____

Type of account: _____

Name(s) on withdrawal cards: _____

Current balance: \$ _____ as of _____

When account opened: _____

Source of funds: _____

Use of account: _____

b. Name of financial institution: _____

Address: _____

Account officer: _____

Account number: _____

Account name: _____

Type of account: _____

Name(s) on withdrawal cards: _____

Current balance: \$ _____ as of _____

When account opened: _____

Source of funds: _____

Use of account: _____

c. Name of financial institution: _____

Address: _____

Account officer: _____

Account number: _____

Account name: _____

Type of account: _____

Name(s) on withdrawal cards: _____

Current balance: \$ _____ as of _____

When account opened: _____

Source of funds: _____

Use of account: _____

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3.2 Savings Accounts:

a. Name of financial institution: _____
Address: _____
Account officer: _____
Account name: _____
Type of account: _____
Name(s) on withdrawal cards: _____
Current balance: \$ _____ as of _____
When account opened: _____
Source of funds: _____
Use of account: _____
Pledged: _____ To: _____
Reason: _____

b. Name of financial institution: _____
Address: _____
Account officer: _____
Account name: _____
Type of account: _____
Name(s) on withdrawal cards: _____
Current balance: \$ _____ as of _____
When account opened: _____
Source of funds: _____
Use of account: _____
Pledged: _____ To: _____
Reason: _____

3.3 Certificates of Deposit:

a. Name of financial institution: _____
Address: _____
Account officer: _____

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Phone: _____

C.D. in the name of: _____

Amount of C.D.: \$ _____ Interest rate: _____

When purchased: _____ When due: _____

Where is C.D. now? _____

Source of funds: _____

Pledged: _____ To: _____

Reason: _____

b. Name of financial institution: _____

Address: _____

Account officer: _____

Phone: _____

C.D. in the name of: _____

Amount of C.D.: \$ _____ Interest rate: _____

When purchased: _____ When due: _____

Where is C.D. now? _____

Source of funds: _____

Pledged: _____ To: _____

Reason: _____

4. Brokerage and Mutual Fund Accounts

a. Name of brokerage firm or mutual fund: _____

Address of brokerage firm: _____

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

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subaccounts, if any):

\$ _____ as of _____

b. 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 _____

5. Publicly Traded Stocks, Bonds, and Other Securities

(Include securities not in a brokerage account, mutual fund, or retirement fund.)

5.1 Stocks:

a. Name of security: _____

Number of shares: _____

Type of security (common stock, preferred stock, bond, or other description):

Certificate numbers: _____

In possession of: _____

Name of exchange on which listed: _____

Pledged as collateral? _____ yes _____ no

If yes, explain terms, to whom pledged, and other details surrounding pledge of securities as collateral:

Current market value: \$ _____ as of _____

Value of community interest: \$ _____ as of _____

5.2 Bonds:

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a. Name of issuer: _____
Address: _____
Serial number of bond: _____ Denomination: _____
Date acquired: _____
Cost: \$ _____ Value: \$ _____ as of _____
Value of community interest: \$ _____ as of _____
Registered owner: _____
Source of funds: _____
Interest rate: _____ Interest payable: _____
Convertible: _____ Due date: _____
Pledged: _____ To: _____
Reason: _____

6. Stock Options

(Include all exercisable, vested, and nonvested stock options regardless of any restrictions on transfer.)

a. Name of company: _____
Date of option or grant: _____
Vesting schedule: _____
Number of options: _____
Are the options exercisable? _____ Are the
options registered? _____
Current stock price: \$ _____ as of _____
Strike price: \$ _____
Current net market value: \$ _____ as of _____
Value of community interest: \$ _____ as of _____

b. Name of company: _____
Date of option or grant: _____
Vesting schedule: _____

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Number of options: _____

Are the options exercisable? _____ Are the
options registered? _____

Current stock price: \$ _____ as of _____

Strike price: \$ _____

Current net market value: \$ _____ as of _____

Value of community interest: \$ _____ as of _____

7. Bonuses

a. Name of company: _____

Date bonus expected to be paid: _____

Anticipated amount of bonus: \$ _____

b. Name of company: _____

Date bonus expected to be paid: _____

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.)

a. Name of business: _____

Address of business: _____

Type of business organization: _____

Percentage of ownership: _____

Number of shares owned (if applicable): _____

Members in business: _____

Annual income from business: \$ _____

Type of business: _____

Date business began: _____

Source of funds in business: _____

Value of interest: \$ _____ as of _____

Is there a written organizational agreement? _____

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Comments: _____

9. Retirement Benefits

9.1 Defined Contribution Retirement 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):

a. Exact name of plan: _____

Name and address of plan administrator: _____

Employer: _____

Employee: _____

Starting date of creditable service: _____

Percentage employee is vested: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Has beneficiary been designated? ___ yes ___ no

If so, identify beneficiary: _____

Current balance: \$ _____ as of _____

Value of community interest in plan: \$ _____

as of _____

Current loan balance: \$ _____ as of _____

9.2 Defined Benefit Retirement Plan (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula):

a. Exact name of plan: _____

Name and address of plan administrator: _____

Employee: _____

Employer: _____

Starting date of creditable service: _____

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Percentage employee is vested: _____

Designated beneficiary: _____

Payee of survivor benefits: _____

Description of benefits: _____

Current balance: \$ _____ as of _____

Value of community interest in plan: \$ _____

as of _____

9.3 IRA/SEP:

a. Name of financial institution: _____

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance: \$ _____

as of _____

Value of community interest in plan: \$ _____

as of _____

9.4 Military Benefits:

a. Branch of service: _____

Name of service member: _____

Rank/pay grade of service member: _____

Starting date of creditable service: _____

Status of service member (active, reserve, or
retired): _____

Payee of survivor benefits: _____

Description of benefits: _____

Monthly benefit payable: \$ _____

Value of community interest in plan: \$ _____

as of _____

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Percentage of plan that is community: _____ %

9.5 Nonqualified Plans:

a. Name of financial institution: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Has beneficiary been designated? ___ yes ___ no

If so, identify beneficiary: _____

Value of community interest in plan: \$ _____

as of _____

9.6 Government Benefits (civil service, teacher, railroad, state and local):

a. Name of plan: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Has beneficiary been designated? ___ yes ___ no

If so, identify beneficiary: _____

Value of community interest in plan: \$ _____

as of _____

10. Other Deferred Compensation Benefits

(Examples include workers' compensation, disability benefits, other "special payments," and other forms of compensation.)

10.1 Husband:

a. Description of assets: _____

Value: \$ _____

10.2 Wife:

a. Description of assets: _____

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Value: \$ _____

11. Insurance and Annuities

11.1 Life Insurance:

a. 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, if any: \$ _____

11.2 Annuities:

a. 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: \$ _____

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Current value: \$ _____ as of _____

Balance of loan against policy, if any: \$ _____

Value of community interest: \$ _____ as of _____

12. Motor Vehicles, Boats, Airplanes, Cycles, etc.

(Include mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles.)

12.1 Vehicles Owned:

a. Year: _____ Make: _____ Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Does vehicle have loan against it? ____ yes ____ no

If yes, state:

Exact name of creditor: _____

Current balance: \$ _____ as of _____

Current net equity in vehicle: \$ ____ Date acquired: ____

Source of down payment: _____

Who should be awarded the vehicle in the divorce? _____

b. Year: _____ Make: _____ Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Does vehicle have loan against it? ____ yes ____ no

If yes, state:

Exact name of creditor: _____

Current balance: \$ _____ as of _____

Current net equity in vehicle: \$ ____ Date acquired: ____

Source of down payment: _____

Who should be awarded the vehicle in the divorce? _____

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-
- c. Year: _____ Make: _____ Model: _____
Name on certificate of title: _____
In possession of: _____
Vehicle identification number: _____
Does vehicle have loan against it? ___ yes ___ no
If yes, state:
Exact name of creditor: _____
Current balance: \$ _____ as of _____
Current net equity in vehicle: \$ _____ Date acquired: _____
Source of down payment: _____
Who should be awarded the vehicle in the divorce? _____
-

13. Loans Receivable

(Include money owed to you or your spouse, including any expected federal or state income tax refund, but do not include receivables connected with a business.)

- a. Name of debtor: _____
Debtor's relationship to you: _____
Purpose of loan: _____
Is debt evidenced in writing? ___ yes ___ no
Is debt secured? ___ yes ___ no
If so, detail security: _____
Is debt reasonably expected to be paid? ___ yes ___ no
Current loan balance: \$ _____ as of _____
Balance of any accounts receivable: \$ _____
- b. Name of debtor: _____
Debtor's relationship to you: _____
Purpose of loan: _____
Is debt evidenced in writing? ___ yes ___ no

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Is debt secured? ___ yes ___ no

If so, detail security: _____

Is debt reasonably expected to be paid? ___ yes ___ no

Current loan balance:\$ _____ as of _____

Balance of any accounts receivable: \$ _____

c. Name of debtor: _____

Debtor's relationship to you: _____

Purpose of loan: _____

Is debt evidenced in writing? ___ yes ___ no

Is debt secured? ___ yes ___ no

If so, detail security: _____

Is debt reasonably expected to be paid? ___ yes ___ no

Current loan balance: \$ _____ as of _____

Balance of any accounts receivable: \$ _____

14. Household Furniture, Furnishings, and Fixtures

State your opinion of the fair market value of the household furniture, furnishings, and fixtures. Fair market value is not necessarily the cost or the replacement value. If you expect a dispute about the division of this property, you may want to attach an itemized list of major items by room. If you or your spouse will contend that any of the property was owned before your marriage or acquired during the marriage by gift or inheritance, please so indicate.

***USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.**

15. Electronics and Computers

***USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.**

16. Antiques, Artwork, and Collections

***USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.**

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17. Miscellaneous Sporting Goods and Firearms

*USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.

18. Jewelry and Other Personal Items

(List major items and state value.)

*USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.

19. Livestock

(Include cattle, horses, and so forth.)

*USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.

20. Club Memberships

- a. Name of club: _____
Name membership held in: _____
Account number: _____
Current value: \$ _____ as of _____
Method of valuation: _____

21. Travel Award Benefits

- a. Name of airline: _____
Account number: _____
Current number of miles: _____ as of _____
Value (if any): \$ _____

22. Miscellaneous Assets

(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 document, estimated tax payments, tax overpayments, loss carry-forward deductions, lottery tickets/winnings, stadium bonds, stadium seat licenses, seat options, and season tickets.)

*USE A SEPARATE SHEET OF PAPER. BE SURE TO INCLUDE VALUE AND WHO YOU PROPOSE BE AWARDED THE PROPERTY UPON FINAL HEARING.

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23. Safe-Deposit Boxes

a. Name of financial institution or other depository:

Box number: _____

Names of persons who have access to contents: _____

Items in safe-deposit box: _____

b. Name of financial institution or other depository:

Box number: _____

Names of persons who have access to contents: _____

Items in safe-deposit box: _____

24. Storage Facilities

a. Name of facility: _____

Address of facility: _____

Unit number: _____

Length of lease: _____

Terms of lease: _____

Names of persons who have access to contents: _____

Items in storage unit: _____

b. Name of facility: _____

Address of facility: _____

Unit number: _____

Length of lease: _____

Terms of lease: _____

Names of persons who have access to contents: _____

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Items in storage unit: _____

25. Community Claim for Reimbursement

(Against Husband's or Wife's separate estate.)

25.1 Reimbursement Claim against Husband's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

25.2 Reimbursement Claim against Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

26. Equitable Interests of Community Estate

26.1 Interest Due to Financial Contribution to Husband's

Separate Estate

Description of basis of claim: _____

Amount claimed: \$ _____

26.2 Interest Due to Financial Contribution to Wife's

Separate Estate

Description of basis of claim: _____

Amount claimed: \$ _____

26.3 Interest Due to Payment of Debts on Husband's

Separate Property

Description of basis of claim: _____

Amount claimed: \$ _____

26.4 Interest Due to Payment of Debts on Wife's

Separate Property

Description of basis of claim: _____

Amount claimed: \$ _____

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27. Contingent Assets

(For example, lawsuits by either party against a third party.)

Nature of claim: _____

Amount of claim: _____

Legal representative: _____

Address: _____

Cause number: _____

Court where case is pending: _____

Name of opposing attorney: _____

Address: _____

28. Community Liabilities

28.1 Credit Cards and Charge Accounts:

a. Name of creditor: _____

Account number: _____

Name(s) on account: _____

Current balance: \$ _____ as of _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

b. Name of creditor: _____

Account number: _____

Name(s) on account: _____

Current balance: \$ _____ as of _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

c. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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Current balance: \$ _____ as of _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

d. Name of creditor: _____

Account number: _____

Name(s) on account: _____

Current balance: \$ _____ as of _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

28.2 Federal, State, and Local Tax Liability:

Amount owed in any previous tax year (describe liability, such as federal income tax, property taxes): \$ _____

Amount owed for current year: \$ _____

28.3 Attorney's Fees in This Case:

a. Husband: \$ _____ as of _____

b. Wife: \$ _____ as of _____

28.4 Other Professional Fees in This Case:

a. Husband: \$ _____ as of _____

b. Wife: \$ _____ as of _____

28.5 Other Liabilities Not Otherwise Listed Elsewhere in This Document:

Name of creditor: _____

Name on account: _____

Account number: _____

Is loan evidenced in writing? _____

Margin account balances: _____

Party incurring liability: _____

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Party actually signing: _____

Current balance: \$ _____ as of _____

Security, if any: _____

28.6 Reimbursement Claims against Community Estate:

Reimbursement claim by husband's separate estate against community estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Reimbursement claim by wife's separate estate against community estate:

Description of basis of claim: _____

Amount claimed: \$ _____

28.7 Equitable Interest Claims against Community Estate:

Equitable interest due to financial contribution of husband's separate property to community estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Equitable interest due to financial contribution of wife's separate property to community estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Equitable interest resulting from use of husband's separate property to pay community property debts:

Description of basis of claim: _____

Amount claimed: \$ _____

Equitable interest resulting from use of wife's separate property to pay community property debts:

Description of basis of claim: _____

Amount claimed: \$ _____

28.8 Pledges:

Name of recipient: _____

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Address of recipient: _____

Date of pledge: _____

Total amount of pledge: \$ _____

Is pledge payable in installments? _____

If payable in installments, date each installment payment
is due: _____

If payable in installments, amount of each installment:
\$ _____

28.9 Contingent Liabilities (for example, lawsuit against either party, guaranty either party may have signed):

Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: \$ _____

Nature of contingency: _____

29. Separate Assets of Husband

29.1 Assets:

a. Description of asset: _____

Date property acquired: _____

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

Value: \$ _____ as of _____

29.2 Husband's Separate Reimbursement Claim against Community Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

29.3 Husband's Separate Reimbursement Claim against Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

29.4 Equitable Interest Claim against Community Estate Due to Financial Contribution:

Description of basis of claim: _____

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Amount claimed: \$ _____

29.5 Equitable Interest Claim against Wife's Separate Estate Due to Financial Contribution:

Description of basis of claim: _____

Amount claimed: \$ _____

29.6 Equitable Interest Claim against Community Estate Resulting from Payment of Debts:

Description of basis of claim: _____

Amount claimed: \$ _____

29.7 Equitable Interest Claim against Wife's Separate Estate Resulting from Payment of Debts:

Description of basis of claim: _____

Amount claimed: \$ _____

30. Liabilities of Husband's Separate Estate

30.1 Liabilities:

a. Description of liability: _____

Date of liability: _____

How liability acquired: _____

Amount of liability: \$ _____ as of _____

30.2 Wife's Separate Reimbursement Claim against Husband's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

30.3 Community Reimbursement Claim against Husband's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

30.4 Equitable Interest Claim by Community Estate Due to Financial Contribution to Husband's Separate Estate:

Description of basis of claim: _____

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Amount claimed: \$ _____

30.5 Equitable Interest Claim by Wife's Separate Estate Due to Financial Contribution to Husband's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

30.6 Equitable Interest Claim by Community Estate Resulting from Payment of Debts on Husband's Separate Property:

Description of basis of claim: _____

Amount claimed: \$ _____

30.7 Equitable Interest Claim by Wife's Separate Estate Resulting from Payment of Debts on Husband's Separate Property:

Description of basis of claim: _____

Amount claimed: \$ _____

31. Separate Assets of Wife

31.1 Assets:

a. Description of asset: _____

Date property acquired: _____

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

Value: \$ _____ as of _____

31.2 Wife's Separate Reimbursement Claim against Community Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

31.3 Wife's Separate Reimbursement Claim against Husband's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

31.4 Equitable Interest Claim against Community Estate Due to Financial Contribution:

Description of basis of claim: _____

Amount claimed: \$ _____

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31.5 Equitable Interest Claim against Husband's Separate Estate Due to Financial Contribution:

Description of basis of claim: _____

Amount claimed: \$ _____

31.6 Equitable Interest Claim against Community Estate Resulting from Payment of Debts:

Description of basis of claim: _____

Amount claimed: \$ _____

31.7 Equitable Interest Claim against Husband's Separate Estate Resulting from Payment of Debts:

Description of basis of claim: _____

Amount claimed: \$ _____

32. Liabilities of Wife's Separate Estate

32.1 Liabilities:

a. Description of liability: _____

Date of liability: _____

How liability acquired: _____

Amount of liability: \$ _____ as of _____

32.2 Husband's Separate Reimbursement Claim against Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

32.3 Community Reimbursement Claim against Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

32.4 Equitable Interest Claim by Community Estate Due to Financial Contribution to Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

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32.5 Equitable Interest Claim by Husband's Separate Estate Due to Financial Contribution to Wife's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

32.6 Equitable Interest Claim by Community Estate Resulting from Payment of Debts on Wife's Separate Property:

Description of basis of claim: _____

Amount claimed: \$ _____

32.7 Equitable Interest Claim by Husband's Separate Estate Resulting from Payment of Debts on Wife's Separate Property:

Description of basis of claim: _____

Amount claimed: \$ _____

33. Children's Property

33.1 Custodial Account under the Texas Uniform Transfers to Minors Act:

a. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit: \$ _____ as of _____

Name of minor for whom funds were deposited: _____

Name of custodian: _____

33.2 Other Property: _____

34. Assets Held by Either Party for the Benefit of Another

a. Name(s) of person(s) holding assets: _____

Description of assets: _____

Name and title of fiduciary (for example, executor or trustee): _____

Name of owner of beneficial interest: _____

Value of assets: \$ _____ as of _____

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35. Assets Held for the Benefit of Either Party as a Beneficiary

- a. Name(s) of person(s) holding assets: _____
Description of assets: _____
Name and title of fiduciary (for example, executor or trustee): _____
Name of owner of beneficial interest: _____
Value of assets: \$ _____ as of _____

Verification

"I have read the instructions and I state that all the community- and separate-property assets and liabilities are fully disclosed on the attached Inventory and Appraisalment."

Client signature

Date: _____