



**CLIENT  
QUESTIONNAIRE  
FOR PREPARATION OF  
INVENTORY AND APPRAISEMENT  
IN DIVORCE**

**PLEASE FILL OUT USING ALL AVAILABLE, ACCURATE INFORMATION AS OF  
THE DATE OF FILING OF YOUR DIVORCE**

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Failure to provide current and accurate information on these forms makes it very difficult to provide service to you as a divorce client of our firm. The family courts of the State of Texas require absolutely accurate reflections of all property, assets, debts, obligations and information regarding you and your spouses's various marital estates, and when appropriate, your failure to provide this information or your providing inaccurate or false information, may result in your own personal liability therefor, possible criminal charges against you and your fee forfeited.

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UPON COMPLETION PLEASE RETURN TO THE OFFICE OF THE EARP LAW FIRM,  
P.C.. IF IN ANSWERING ANY PART OF THIS QUESTIONNAIRE YOU HAVE  
QUESTIONS, PLEASE DO NOT HESITATE TO CALL US.

## **INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT WORKSHEET**

### **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 buyer, under no compulsion to buy, with both parties having reasonable knowledge of the relevant facts. Use this value whenever possible. A better way to explain this valuation attempt is to take what you reasonably believe you could get for the item at a garage sale or estate sale. 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 Appraisal. 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 Appraisal. If an asset has any document that can clearly identify it, return a copy with this Preparation of Inventory and Appraisal.

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

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.

### **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.

Yours Truly,

A handwritten signature in blue ink, appearing to read 'Brandon S. Eap', with a horizontal line extending from the end of the signature.

Brandon S. Eap  
Attorney at Law

**INVENTORY AND APPRAISEMENT WORKSHEET OF**

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(Write Name)

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

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: \_\_\_\_\_

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

7.2. 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)

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: \_\_\_\_\_

Percentage employee is vested: \_\_\_\_\_

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

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

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

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

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

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

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

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: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
Account name: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Account balance as of date of marriage: \$ \_\_\_\_\_  
Payee of survivor benefits: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
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: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
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: \_\_\_\_\_  
Percentage employee is vested: \_\_\_\_\_  
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*

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. Insurance and Annuities**

11.A. *Life Insurance*

- 11.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: \$ \_\_\_\_\_
- 11.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: \$ \_\_\_\_\_

*11.B. Annuities*

11.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 \_\_\_\_\_):  
\$ \_\_\_\_\_

11.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 \_\_\_\_\_):

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

**12. Motor Vehicles, Boats, Airplanes, Cycles, etc.** (including mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles)

12.1. 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: \$\_\_\_\_\_

12.2. 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: \$ \_\_\_\_\_

12.3. 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: \$ \_\_\_\_\_

12.4. 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: \$ \_\_\_\_\_

**13. 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)

13.1. 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 \_\_\_\_\_):

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

13.2. 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 \_\_\_\_\_):

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

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

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**15. Electronics and Computers**

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

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. Miscellaneous Sporting Goods and Firearms**

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. Jewelry and Other Personal Items**

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

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. Club Memberships**

20.1. Name of club: \_\_\_\_\_

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

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

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

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

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

20.2. Name of club: \_\_\_\_\_

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

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

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

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

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

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

21.1. Name of airline: \_\_\_\_\_

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

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

\_\_\_\_\_

Current value (if any): \$ \_\_\_\_\_

21.2. Name of airline: \_\_\_\_\_

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

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

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

**22. 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)

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**23. Safe-Deposit Boxes**

23.1. Name of financial institution or other depository:

\_\_\_\_\_

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

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

\_\_\_\_\_

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

\_\_\_\_\_

23.2. Name of financial institution or other depository:

\_\_\_\_\_

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

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

\_\_\_\_\_

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

\_\_\_\_\_

23.3. Name of financial institution or other depository:

\_\_\_\_\_

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

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

\_\_\_\_\_

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

**24. Storage Facilities**

24.1. Name and location: \_\_\_\_\_

\_\_\_\_\_

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

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

\_\_\_\_\_

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

\_\_\_\_\_

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

24.2. Name and location: \_\_\_\_\_

\_\_\_\_\_

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

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

\_\_\_\_\_

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

\_\_\_\_\_

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

24.3. Name and location: \_\_\_\_\_

\_\_\_\_\_  
Unit number: \_\_\_\_\_  
Terms and length of lease: \_\_\_\_\_  
\_\_\_\_\_  
Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_  
Items in storage unit: \_\_\_\_\_  
\_\_\_\_\_

**25. Community Claim for Reimbursement**

25.1. Reimbursement claim against husband's separate estate:

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

25.2. Reimbursement claim against wife's separate estate:

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

**26. Equitable Interest(s) of Community Estate**

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

Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

26.3. Equitable interest resulting from use of community property to pay debts on

husband's separate property:

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

Amount of claim (as of \_\_\_\_\_):

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

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

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

Amount of claim (as of \_\_\_\_\_):

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

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

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

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

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

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

**28. Community Liabilities**

*28.A. Credit Cards and Charge Accounts*

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

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

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

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

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

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

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

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

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

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

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

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

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

28.A.3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_ >

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

28.A.4. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

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

28.A.5. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_

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

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

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

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

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

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

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

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

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

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: \_\_\_\_\_

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: \_\_\_\_\_

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: \_\_\_\_\_

28.F. *Reimbursement Claims against Community Estate*

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

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

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

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

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

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

28.G. *Equitable Interest Claims against Community Estate*

28.G.1. Equitable interest due to financial contribution of husband's  
separate property to community estate:

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

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

28.G.2. Equitable interest due to financial contribution of wife's  
separate property to community estate:

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

Amount of claim (as of \_\_\_\_\_):



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

28.G.3. Equitable interest resulting from use of husband's separate property to pay community property debts:

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

Amount of claim (as of \_\_\_\_\_):

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

28.G.4. Equitable interest resulting from use of wife's separate property to pay community property debts:

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

Amount of claim (as of \_\_\_\_\_):

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

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: \_\_\_\_\_

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

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

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

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

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

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

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

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

29.2. Husband's separate reimbursement claim against community estate:

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

29.3. Husband's separate reimbursement claim against wife's separate estate:

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

29.4. Equitable interest claim due to financial contribution of husband's separate estate to community estate:

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

Amount of claim (as of \_\_\_\_\_):

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

29.5. Equitable interest claim due to financial contribution of husband's separate estate to wife's separate estate:

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

Amount of claim (as of \_\_\_\_\_):

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

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

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

Amount of claim (as of \_\_\_\_\_):

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

29.7. Equitable interest claim resulting from use of husband's separate property to pay

debts on wife's separate property:  
Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

30.1. 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:  
Value (as of \_\_\_\_\_): <\$ \_\_\_\_\_ >

30.3. Community estate's reimbursement claim against husband's separate estate:  
Value (as of \_\_\_\_\_): <\$ \_\_\_\_\_ >

30.4. Equitable interest claim due to financial contribution of community property to husband's separate estate:  
  
Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

30.5. Equitable interest claim due to financial contribution of wife's separate property to husband's separate estate:  
  
Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

30.6. Equitable interest claim resulting from use of community property to pay debts on husband's separate property:  
  
Basis of claim: \_\_\_\_\_  
Amount of claim (as of \_\_\_\_\_):

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

30.7. Equitable interest claim resulting from use of wife's separate property to pay debts on husband's separate property:

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

Amount of claim (as of \_\_\_\_\_):

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

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

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

31.2. Wife's separate reimbursement claim against community estate:

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

31.3. Wife's separate reimbursement claim against husband's separate estate:

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

31.4. Equitable interest claim due to financial contribution of wife's separate estate to community estate:

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

Amount of claim (as of \_\_\_\_\_):

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

31.5. Equitable interest claim due to financial contribution of wife's separate estate to husband's separate estate:

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

Amount of claim (as of \_\_\_\_\_):

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

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

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

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

31.7. Equitable interest claim resulting from use of wife's separate property to pay debts on husband's separate property:

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

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

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

32.1. 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:

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

32.3. Community estate's reimbursement claim against wife's separate estate:

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

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

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

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

32.5. Equitable interest claim due to financial contribution of husband's separate property to wife's separate estate:

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

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

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

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

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

- 32.7. Equitable interest claim resulting from use of husband's separate property to pay debts on wife's separate property:  
 Basis of claim: \_\_\_\_\_  
 Amount of claim (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >

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

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

ADDITIONAL NOTES TO ATTORNEY:

\*\*\*\*\*

**VERIFICATION**

"I have read the instructions for how to fill out the Inventory and Appraisal Worksheet and I state that all the community- and separate-property assets and liabilities are fully disclosed on the attached Inventory and Appraisal Worksheet."

Sign: \_\_\_\_\_

Printed Name of Client: \_\_\_\_\_

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

\*\*\*\*\*