

INVENTORY & APPRAISEMENT

NAME: _____

DATE: _____

INSTRUCTIONS:

General

We prefer that you type up your answers separately, and just refer to the Question #. you are answering. You do not have to re-type the question. We also prefer that you e-mail us the answers in 1 of the following formats: Microsoft Word, WordPerfect, or Works. Many of these questions may not apply to you. If so, please just put "N/A" after the Question #. That way we know that you saw the question.

YOU SHOULD RETURN THIS FORM AND ALL SUPPORTING DOCUMENTS TO OUR OFFICE WITHIN 10 DAYS, unless we have already instructed you to return it sooner. This will allow our office ample time to review the document, go over it with you, and put it into its final format.

Property to Include

Include a list of all property owned by you or your spouse even if you don't have all specifics on the property. For certain types of property, like household goods, you can put them in categories as opposed to listing each individual item. For example, when it comes to dishware and cutlery, you do not have to list each one separately. You can just put a general description like: "household dishes and kitchen tools - \$100.00". Or for clothing, you can list: "Husband's personal clothing - \$500.00." For items that have an account #, just list the last 3 digits, unless otherwise instructed.

Separate Property vs. Community Property

Make sure to include all property, no matter whose name the property's title is in, and even if you intend to argue that it is your separate property instead of community property. If either you or your spouse has any property you think is separate property, complete the section marked "Separate Estates of the Parties."

Separate property is defined as follows:

1. Property acquired by a spouse before marriage.
2. Property acquired by a spouse during marriage by gift or inheritance.
3. Funds received as a result of personal injury sustained by a spouse.
4. Property acquired with funds that are separate property. Property may be purchased with funds that are both community and separate property. In such a case, please be sure to list pro rata the part of the property that is separate property in the separate property section and the part that is community property in the community property section.

Community Property - All property that is not separate property is community property.

NOTE: All property owned by the spouses is presumed to be community, unless proven otherwise.

Valuation of Property

Do your best to put a reasonable value on your items. For real estate, you can use the current local Tax Assessor's evaluation. For vehicles, you can use: Kelly Blue Book value or NADA. For personal items and furniture, think about what you would actually be willing to sell them for at a garage sale.

Certain items may only have intrinsic or sentimental value to you. If so, think about what other equivalent value of property you would be willing to give up in exchange for the other party allowing you to keep that property.

Other items may require that a professional appraiser be hired to make the valuation (like a small business, or certain jewelry or art pieces). If so, the Court will generally require the parties to split the cost of the appraisal.

Also keep in mind the term “Fair Market Value”. This is the price at which the asset would change hands between a willing seller, under no obligation to sell, and a willing buyer, under no obligation to buy, with both parties having reasonable knowledge of the relevant facts. If an asset has no fair market value, state the actual value of the asset to you considering its present condition.

If you are tempted to intentionally devalue or overvalue a property, it could come back to haunt you if the other party decides they suddenly want that piece of property, don’t want it after all, or wants to take other property of an equivalent value.

Do not enlist your spouse's help unless we specifically permit it. You and your spouse are now legal adversaries, and you should verify all information on your own. When it comes to questions of the current value of property, you should make your own independent estimate, whether you decide the value or consult another source, like an appraiser.

Property Division

In addition to factual data, we need to know your wishes about division of the property. Please indicate your wishes in the left margin of the form by placing a "P" next to items you want to go to the Plaintiff, and an "R" next to items you want to go to the other party. (The “Plaintiff” is the party who filed for divorce first, and the “Respondent” is the party who got

served with divorce papers first.)

Reimbursement

In most cases, the parties do not need to fill out this section. Before completing any items that you think might involving reimbursement claims, please read this section.

Texas law recognizes three marital estates: (1) the Community estate, owned by both spouses together; (2) the Plaintiff's separate estate; and (3) the Respondent's estate. A spouse's separate estate consists of the spouse's separate property, as defined above. The community estate consists of all other property, other than separate property, acquired by either spouse during marriage.

If any of the following has happened in your case, please circle the appropriate numbers and consult with your attorney on how to proceed , what information and documents you will need, and how to complete the items on this schedule that correspond to the numbers:

25.1, 25.2, 29.3, 31.3 Has the community estate made any payments on the unsecured liability of your separate estate or your spouse's separate estate?

25.1, 25.2, 29.3, 31.3 Has the community estate made any payments on the secured liabilities on your separate estate or your spouse's separate estate?

25.1, 25.2, 29.3, 31.3 Has the community estate been used to make capital improvements to your separate estate or to your spouse's separate estate other than by incurring debt?

25.1, 25.2, 29.3, 31.3 Has either spouse received inadequate compensation for the time, toil, talent, and effort spent working for separate-property business owned by the spouse that is under the spouse's control or direction?

27.F, 28.2, 30.2 Has your separate estate or your spouse's separate estate made any payments on the unsecured liabilities of the community estate?

27.F, 28.2, 30.2 Has your separate estate or your spouse's separate estate made any payments on the secured liabilities of the community estate?

27.F, 28.2, 30.2 Has your separate estate or your spouse's separate estate been used to make capital improvements to the community estate other than by incurring debt?

28.3, 31.2 Has the husband's separate estate made any payments on the unsecured liabilities of the wife's separate estate?

28.3, 31.2 Has the husband's separate estate made any payments on the secured liabilities of the wife's separate estate?

28.3, 31.2 Has the husband's separate estate been used to make capital improvements to the wife's separate estate other than by incurring debt?

29.2, 30.3 Has the wife's separate estate made any payments on the unsecured liabilities of the husband's separate estate?

29.2, 30.3 Has the wife's separate estate made any payments on the secured liabilities of the husband's separate estate?

29.2, 30.3 Has the wife's separate estate been used to make capital improvements to the husband's separate estate other than by incurring debt?

Copies of Documents to Be Included

Please provide us any supporting documentation you have reflecting the value of the property. For example, if an asset has a statement of account, return a copy of the most current statement of account with this 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 Inventory and Appraisal.

Here is a checklist of some of the copies of items you should return with this 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. titles 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.

If possible, please provide us electronic copies of the documents (e-mail, thumb drive or disk). Label them according to the question # they apply to, and then the name of the document (i.e. "1 - Warranty Deed to 123 Main Street").

If providing paper copies of the documents, please put the documents in chronological order, according to the question they apply to. Also, put them in separate folders, or put a sticky note on them with the applicable question #. DO NOT write directly on the documents themselves. Also DO NOT give us the original copies of the documents, unless we have specifically requested an original copy. Make a copy and give the copy to us.

Confidentiality

Do not let anyone see this document (including your spouse). We may have to turn over a copy to the other party or the court eventually, but until that it is decided, it needs to be treated as confidential “work product” between you and our office.

Full Disclosure

We will rely on this Inventory and Appraisement to figure out how to argue for the best property and debt division we can get you in this 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 signing the Inventory & Appraisement, you verify to us and the Court that these are all the assets and liabilities of community and separate property of which you have knowledge, and these values are accurate to the best of your information & belief. If it is filed with the Court, then it becomes a “judicial admission”, meaning that you will find it very difficult or impossible to argue otherwise in Court.

Conclusion

If you have any problems filling out this form, please call our office with any questions. In the meantime, fill out all the parts that you can, so that we do not lose time in this case.

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: _____

Names of other lienholders: _____

Current net equity in property: \$ _____

1.2. Street address: _____

County of location: _____

Description of improvements, if any: _____

Legal description: _____

Current fair market value (as of _____): _____

\$ _____

Name of mortgage company and account number, if any: _____

Current balance of mortgage (as of _____):

\$ _____

Other liens against property: _____

Names of other lienholders: _____

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: _____

Names of other lienholders: _____

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 and Mutual Fund Accounts

4.1. Name of brokerage firm or mutual fund: _____

Address of brokerage firm or 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 ____):

Tax basis of each security held: \$ _____

4.2. Name of brokerage firm or mutual fund: _____

Address of brokerage firm or 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 ____):

Tax basis of each security held:\$ _____

4.3. Name of brokerage firm or mutual fund: _____

Address of brokerage firm or 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 ____):

Tax basis of each security held:\$_____

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]

Date acquired:_____

Tax basis:\$_____

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]

Date acquired: _____

Tax basis: \$ _____

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: \$ _____

If purchased, total purchase price of option contract (including commissions):

\$ _____

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: \$ _____

If purchased, total purchase price of option contract (including commissions):
\$ _____

Current net market value (as of _____):
\$ _____

Value of community interest (as of _____):
\$ _____

7. Bonuses

7.1. Name of company: _____

Spouse earning bonus: _____

Date bonus expected to be paid: _____

Time period covered by bonus: _____

Anticipated amount of bonus: \$ _____

7.2. Name of company: _____

Spouse earning bonus: _____

Date bonus expected to be paid: _____

Time period covered by bonus: _____

Anticipated amount of bonus: \$ _____

8. Closely Held Business Interests (include sole proprietorships, professional practices, corporations, partnerships, limited liability companies and partnerships, joint ventures, and other nonpublicly traded business entities)

8.1. Name of business: _____

Address: _____

Type of business organization: _____

Percentage of ownership: _____

Number of shares owned (if applicable): _____

Value (as of _____):
\$ _____

Balance of accounts receivable if on cash basis accounting: \$ _____

Balance of liabilities if on cash basis accounting: _____
<\$ _____ >

9. Retirement Benefits

9.A. *Defined Contribution Plans* (a plan that provides for an individual account for a participant and for benefits based solely on the amount contributed to the participant's account; IRC §§ 401(k), 403(b))

9.A.1. Exact name of plan: _____

Name and address of plan administrator: _____

Employee: _____

Employer: _____

Starting date of creditable service: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance (as of _____):
\$ _____

Balance of loan against plan: \$ _____

Value of community interest in plan (as of _____):
\$ _____

9.A.2. Exact name of plan: _____

Name and address of plan administrator: _____

Employee: _____

Employer: _____

Starting date of creditable service: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance (as of _____):
\$ _____

Balance of loan against plan: \$ _____

Value of community interest in plan (as of _____):
\$ _____

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

9.B.1. Exact name of plan: _____

Name and address of plan administrator: _____

Employee: _____

Employer: _____

Starting date of creditable service: _____

Designated beneficiary: _____

Payee of survivor benefits: _____

Description of benefits: _____

Value of community interest in plan (as of _____):
\$ _____

9.B.2. Exact name of plan: _____

Name and address of plan administrator: _____

Employee: _____

Employer: _____

Starting date of creditable service: _____

Designated beneficiary: _____

Payee of survivor benefits: _____

Description of benefits: _____

Value of community interest in plan (as of _____):
\$ _____

9.C. *IRA/SEP*

9.C.1. Name of financial institution: _____

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance (as of _____):
\$ _____

Value of community interest (as of _____):
\$ _____

9.C.2. Name of financial institution: _____

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance (as of _____):
\$ _____

Value of community interest (as of _____):
\$ _____

9.D. *Military Benefits*

9.D.1. Branch of service: _____

Name of service member: _____

Rank/pay grade of service member: _____

Starting date of creditable service: _____

Status of service member: [active/reserve/retired] _____

Payee of survivor benefits: _____

Description of benefits: _____

Monthly benefit payable: \$ _____

Value of community interest in plan (as of _____):
\$ _____

Percentage of plan that is community: _____%

9.D.2. Branch of service: _____

Name of service member: _____

Rank/pay grade of service member: _____

Starting date of creditable service: _____

Status of service member: [active/reserve/retired] _____

Payee of survivor benefits: _____

Description of benefits: _____

Monthly benefit payable: \$ _____

Value of community interest in plan (as of _____):
\$ _____

Percentage of plan that is community: _____%

9.E. *Nonqualified Plans (Not under ERISA)*

9.E.1. Name of financial institution: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Value of community interest in plan (as of _____):
\$ _____

9.E.2. Name of financial institution: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Value of community interest in plan (as of _____):
\$ _____

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

9.F.1. Name of plan: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Value of community interest in plan (as of _____):
\$ _____

9.F.2. Name of plan: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Value of community interest in plan (as of _____):
\$ _____

10. Other Deferred Compensation Benefits (e.g., worker's compensation, disability benefits, other "special payments", and other forms of compensation)

10.1. Husband

Description of Asset	Value
_____	_____
_____	_____
_____	_____

10.2. Wife

Description of Asset	Value
_____	_____
_____	_____
_____	_____

11. Union Benefits (include all insurance, pensions, retirement benefits, and other benefits arising out of membership in any union)

11.1. Name of union member: _____

Name of Union: _____

Description of benefits: _____

Value (as of _____):\$ _____

11.2. Name of union member: _____

Name of Union: _____

Description of benefits: _____

Value (as of _____):\$ _____

12. Insurance and Annuities

12.A. *Life Insurance*

12.A.1. Name of insurance company: _____

Policy number: _____

Name of insured: _____

Name of owner: _____

Type of insurance: [term/whole/universal]

Amount of premiums [monthly/quarterly/semiannually]:
\$ _____

Date of issue: _____

Face amount: _____

Cash surrender value on date of marriage: _____

Current cash surrender value: _____

Designated beneficiary: _____

Balance of loan against policy: \$ _____

Value of community interest (as of _____):
\$ _____

12.A.2.

Name of insurance company: _____

Policy number: _____

Name of insured: _____

Name of owner: _____

Type of insurance: [term/whole/universal]

Amount of premiums [monthly/quarterly/semiannually]:
\$ _____

Date of issue: _____

Face amount: _____

Cash surrender value on date of marriage: _____

Current cash surrender value: \$ _____

Designated beneficiary: _____

Balance of loan against policy: \$ _____

Value of community interest (as of _____):
\$ _____

12.B. *Annuities*

12.B.1. Name of company: _____

Policy number: _____

Name of annuitant: _____

Name of owner: _____

Type of annuity: _____

Amount of premiums [monthly/quarterly/semiannually]: \$ _____

Date of issue: _____

Face amount: _____

Designated beneficiary: _____

Value on date of marriage: _____

Current value (as of _____):
\$ _____

Balance of loan against policy: \$ _____

Value of community interest (as of _____):
\$ _____

12.B.2. Name of company: _____

Policy number: _____

Name of annuitant: _____

Name of owner: _____

Type of annuity: _____

Amount of premiums [monthly/quarterly/semiannually]:
\$ _____

Date of issue: _____

Face amount: _____

Designated beneficiary: _____

Value on date of marriage: _____

Current value (as of _____):
\$ _____

Balance of loan against policy: \$ _____

Value of community interest (as of _____):
\$ _____

12.C. *Health Savings Accounts*

12.C.1. Institution holding account: _____

Account number: _____

Name of high-deductible health plan with which the HSA
is coupled: _____

Value of assets in account (as of _____):
\$ _____

12.C.2. Institution holding account: _____

Account number: _____

Name of high-deductible health plan with which the HSA
is coupled: _____

Value of assets in account (as of _____):
\$ _____

12.D. *Medical Savings Accounts*

12.D.1. Institution holding account: _____

Account number: _____

Name of high-deductible health plan with which the MSA is coupled: _____

Value of assets in account (as of _____):
\$ _____

12.D.2. Institution holding account: _____

Account number: _____

Name of high-deductible health plan with which the MSA is coupled: _____

Value of assets in account (as of _____):
\$ _____

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

13.1. Year: _____

Make: _____

Model: _____

Name on title: _____

In possession of: _____

Vehicle identification number: _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____):
\$ _____

Current fair market value of vehicle (as of _____):
\$ _____

Current net equity in vehicle: \$ _____

13.2. Year: _____

Make: _____

Model: _____

Name on title: _____

In possession of: _____

Vehicle identification number: _____

Fair market value of vehicle: \$ _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____):
\$ _____

Current net equity in vehicle: \$ _____

13.3. Year: _____

Make: _____

Model: _____

Name on title: _____

In possession of: _____

Vehicle identification number: _____

Fair market value of vehicle: \$ _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____):
\$ _____

Current net equity in vehicle: \$ _____

13.4. Year: _____

Make: _____

Model: _____

Name on title: _____

In possession of: _____

Vehicle identification number: _____

Fair market value of vehicle: \$ _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____):

\$ _____

Current net equity in vehicle: \$ _____

14. Money Owed to Me or My Spouse (include any expected federal or state income tax refund but do not include receivables connected with a business)

14.1. Name of debtor: _____

Debtor's relationship to you: _____

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of _____):

\$ _____

14.2. Name of debtor: _____

Debtor's relationship to you: _____

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of _____):
\$ _____

15. Household Furniture, Furnishings, and Fixtures

15.1. In possession of Husband (attach separate sheet by room if necessary):

Description of Asset	Value

15.2. In possession of Wife (attach separate sheet by room if necessary):

Description of Asset	Value

16. Electronics and Computers

16.1. In possession of Husband (attach separate sheet if necessary):

Description of Asset	Value

16.2. In possession of Wife (attach separate sheet if necessary):

Description of Asset	Value

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

17.1. In possession of Husband (attach separate sheet if necessary):

Description of Asset	Value

17.2. In possession of Wife (attach separate sheet if necessary):

Description of Asset	Value

18. Miscellaneous Sporting Goods and Firearms

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

Description of Asset	Value

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

Description of Asset	Value

19. Jewelry and Other Personal Items

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

Description of Asset	Value

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

Description of Asset

Value

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

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

Description of Asset

Value

20.2. In possession of Wife (attach separate sheet if necessary):

Description of Asset

Value

21. Club Memberships

21.1. Name of club: _____

Name membership held in: _____

Account number: _____

Current value (as of _____):

\$ _____

Method of valuation: _____

21.2. Name of club: _____

Name membership held in: _____

Account number: _____

Current value (as of _____):
\$ _____

Method of valuation: _____

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

22.1. Name of airline: _____

Account number and name on account: _____,

Current number of miles (as of _____):

Current value (if any): \$ _____

22.2. Name of airline: _____

Account number and name on account: _____,

Current number of miles (as of _____):

Value (if any): \$ _____

23. Miscellaneous Assets (include intellectual property, licenses, crops, farm equipment, construction equipment, tools, leases, cemetery lots, gold or silver coins not part of a collection described elsewhere in this inventory, estimated tax payments, tax overpayments, loss carry-forward deductions, lottery tickets/winnings, stadium bonds, stadium seat licenses, seat options, and season tickets)

23.1. In possession of Husband (attach separate sheet if necessary):

Description of Asset

Value

23.2. In possession of Wife (attach separate sheet if necessary):

Description of Asset

Value

24. Safe-Deposit Boxes

24.1. Name of financial institution or other depository: _____

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

24.2. Name of financial institution or other depository: _____

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

24.3. Name of financial institution or other depository: _____

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

25. Storage Facilities

25.1. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

25.2. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

25.3. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

26. Community Claim for Reimbursement

26.1. Reimbursement claim against Husband's separate estate:

Basis of claim: _____

Amount claimed (as of _____):
\$ _____

26.2. Reimbursement claim against Wife's separate estate:

Basis of claim: _____

Amount claimed (as of _____):
\$ _____

27. 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.2. 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 claimed (as of _____):
\$ _____

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

Basis of Claim: _____

Amount claimed (as of _____):
\$ _____

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

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

28.H.1. Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: <\$ _____>

Nature of contingency: _____

28.H.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:

Basis of claim: _____

Amount claimed (as of _____):
\$ _____

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

Basis of claim: _____

Value (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:

Basis of claim: _____

Value (as of _____):
\$ _____

30.3. Community estate's reimbursement claim against Husband's separate estate:

Basis of claim: _____

Value (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:

Basis of claim: _____

Value (as of _____): \$ _____

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

Basis of claim: _____

Value (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 property reimbursement claim against Wife's separate estate:

Basis of Claim: _____

Amount claimed (as of _____):
\$ _____

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

Basis of Claim: _____

Amount claimed (as of _____):
\$ _____

Children's Property

33. Children's Property (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act, 529 plans)

A. *Custodial Account under Texas Uniform Transfers to Minors Act*

33.A.1. Name of financial institution: _____

Address of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____):
\$ _____

Name of minor for whom funds were deposited: _____

33.A.2. Name of financial institution: _____

Address of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____):
\$ _____

Name of minor for whom funds were deposited: _____

33.A.3. Name of financial institution: _____
Address of financial institution: _____
Name of account: _____
Account number: _____
Amount on deposit (as of _____):
\$ _____
Name of minor for whom funds were deposited: _____

33.A.4. Name of financial institution: _____
Address of financial institution: _____
Name of account: _____
Account number: _____
Amount on deposit (as of _____):
\$ _____
Name of minor for whom funds were deposited: _____

B. *529 Plan*

33.B.1. Institution or entity administering plan: _____
Designated beneficiary: _____
Type of plan: _____
Value of assets in plan (as of _____):
\$ _____

33.B.2. Institution or entity administering plan: _____
Designated beneficiary: _____
Type of plan: _____
Value of assets in plan (as of _____):
\$ _____

33.B.3. Institution or entity administering plan: _____

Designated beneficiary: _____

Type of plan: _____

Value of assets in plan (as of _____):
\$ _____

33.B.4. Institution or entity administering plan: _____

Designated beneficiary: _____

Type of plan: _____

Value of assets in plan (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 _____):
\$ _____

Verification

I, _____, state on oath that, to the best of my knowledge and belief, this Inventory and Appraisement contains -

1. a full and complete list of all properties that I claim belong to the community estate of me and my spouse, with the values thereof;
2. a full and complete list of all properties in my possession or subject to my control that I claim or admit are my or my spouse's separate property and estate, with the values thereof; and
3. a full and complete list of the debts that I claim are community indebtedness.

Any omission from this inventory is not intentional but is done through mere inadvertence and not to mislead my spouse. There may be other assets and liabilities of which my spouse is aware, and the omission of those items from this Inventory and Appraisement should not be construed as a waiver of my interest in them.

Signature of Party

SIGNED under oath before me on _____.

Notary Public, State of Texas