

INVENTORY AND APPRAISEMENT OF _____

_____, Petitioner/Respondent, submits this inventory and appraisal of all assets and liabilities, community and separate estates, as follows:

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. 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: _____;
account number _____

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

Other liens against property: None

Current net equity in property: \$

2. 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)

1. Cash on hand (as of _____): \$

2. Name of financial institution: _____

Account name: _____

Account number:

Type of account: checking account

Name(s) on withdrawal cards:

Current account balance (as of _____): \$

3. Retirement Benefits

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))

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 _____): \$

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

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 _____): \$

C. *IRA/SEP*

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 _____): \$

4. Insurance and Annuities

A. *Life Insurance*

1. Name of insurance company:

Policy number:

Name of insured:

Name of owner:

Type of insurance:

Amount of premiums monthly:

Date of issue:

Face amount: \$

Cash surrender value on date of marriage: \$

Current cash surrender value: \$

Designated beneficiary:

Balance of loan against policy: N/A

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

B. *Annuities*

1. Name of company: _____

Policy number:

Name of annuitant: _____

Name of owner: _____

Type of annuity:

Amount of premiums monthly: \$

Date of issue:

Face amount: \$

Designated beneficiary:

Value on date of marriage: \$

Current value (as of _____): \$

Balance of loan against policy: N/A

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

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

1. Year:

Make: _____

Model:

Name on certificate of title:

In possession of:

Vehicle identification number:

Fair market value of vehicle: \$

Name of creditor if loan against vehicle:

Current net equity in vehicle: \$

2. Year:

Make:

Model:

Name on certificate of title:

In possession of:

Vehicle identification number:

Fair market value of vehicle: \$

Name of creditor if loan against vehicle:

Current net equity in vehicle: \$

6. Household Furniture, Furnishings, and Fixtures

1. In possession of husband:

Asset:
Value:

2. In possession of wife:

Asset:
Value:

7. Electronics and Computers

1. In possession of husband:

Asset:
Value:

Asset:
Value:

2. In possession of wife:

Asset:
Value:

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

1. In possession of husband:

Asset:
Value:

2. In possession of wife:

Asset:
Value:

9. Miscellaneous Sporting Goods and Firearms

1. In possession of husband:

Asset:
Value:

2. In possession of wife:

Asset:
Value:

10. Jewelry and Other Personal Items

1. In possession of husband:

Asset:
Value:

2. In possession of wife:

Asset:
Value:

11. Community Liabilities

A. *Credit Cards and Charge Accounts*

1. Name of creditor:

Account number:

Name(s) on account:

Current balance (as of):

Balance as of date of separation:

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

1. Amount owed in any previous tax year:

Amount owed for current year

C. *Attorney's Fees in This Case*

1. Description of fee:

Amount owed (as of _____):

Separate Estates of the Parties

12. **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):
None

13. **Liabilities of Husband's Separate Estate:** None

14. **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)

1. Description of asset:

Date property acquired:

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

Value (as of): \$

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

1. Description of liability:

Date of liability:

How liability acquired:

Amount of liability (as of): \$

Children's Property

16. **Children's Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act): None

Trust and Estate Assets

17. **Assets Held by Either Party for the Benefit of Another** (include formal and informal trusts): None

18. **Assets Held for the Benefit of Either Party as a Beneficiary** (include formal and informal trusts): None

Verification

I, _____, state on oath that, to the best of my knowledge and belief, this inventory and appraisalment 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 should not be construed as a waiver of my interest in them.

client

State of Texas §

County of _____ §

SIGNED under oath before me on _____.

Notary Public, State of Texas