

CAUSE NO. _____

IN THE MATTER OF
THE MARRIAGE OF

AND

AND IN THE INTEREST OF
_____,
MINOR CHILDREN

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IN THE DISTRICT COURT

_____ JUDICIAL DISTRICT

_____ COUNTY, TEXAS

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

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: _____

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. Cash and Accounts with Financial Institutions

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

2.2. Travelers Checks (as of _____): \$ _____

2.3. Money Orders (as of _____): \$ _____

2.4. Name of financial institution: _____

Account name: _____

Account number: _____

Type of account:

Name(s) on withdrawal cards: _____

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

2.5. Name of financial institution: _____

Account name: _____

Account number: _____

Type of account:

Name(s) on withdrawal cards: _____

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

- 2.6. Name of financial institution: _____
Account name: _____
Account number: _____
Type of account: _____
Name(s) on withdrawal cards: _____
Current account balance (as of _____): \$_____
- 2.7. Name of financial institution: _____
Account name: _____
Account number: _____
Type of account: _____
Name(s) on withdrawal cards: _____
Current account balance (as of _____): \$_____
- 2.8. Name of financial institution: _____
Account name: _____
Account number: _____
Type of account: _____
Name(s) on withdrawal cards: _____
Current account balance (as of _____): \$_____
- 2.9. Name of financial institution: _____
Account name: _____
Account number: _____
Type of account: _____
Name(s) on withdrawal cards: _____

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

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

3.1. Year: _____

Make & Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Fair Market Value: _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____): \$_____

Current net equity in vehicle: \$_____

3.2. Year: _____

Make & Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Fair Market Value: _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____): \$_____

Current net equity in vehicle: \$_____

3.3. Year: _____

Make & Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Fair Market Value: _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____): \$_____

Current net equity in vehicle: \$_____

3.4. Year: _____

Make & Model: _____

Name on certificate of title: _____

In possession of: _____

Fair Market Value: _____

Vehicle identification number: _____

Name of creditor if loan against vehicle: _____

Current balance (as of _____): \$_____

Current net equity in vehicle: \$_____

4. Retirement Benefits

4.A. Defined Contribution Plans

4.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 _____): \$_____

Current community value (as of _____): \$_____

Balance of loan against plan: \$ _____

4.B. *Defined Benefit Plan*

4.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: _____

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

4.C. *IRA/SEP*

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

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

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

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

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

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

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

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

4.D. *Nonqualified Plans*

4.D.1. Name of financial institution: _____

Account name: _____

Account number: _____

Account balance as of date of marriage: \$_____

Payee of survivor benefits: _____

Designated beneficiary: _____

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

5. Other Deferred Compensation Benefits

5.1. Husband

<u>Description of Assets</u>	<u>Value</u>
_____	\$ _____

5.2. Wife

<u>Description of Assets</u>	<u>Value</u>
_____	\$ _____

6. Insurance and Annuities

6.A. *Life Insurance*

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

Policy number: _____

Name of insured: _____

Name of owner: _____

Type of insurance:

Amount of premiums semiannually: \$ _____

Date of issue: _____

Face amount: \$ _____

Cash surrender value on date of marriage: \$ _____

Current cash surrender value: \$ _____

Designated beneficiary: _____

Balance of loan against policy: \$ _____

6.A.2. 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: \$

6.A.3. 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: \$

6.A.4. 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: \$

6.B. *Annuities*

6.B.1. Name of company: _____

Policy number: _____

Name of annuitant: _____

Name of owner: _____

Type of annuity: _____

Amount of premiums monthly: \$_____

Date of issue: _____

Face amount: \$_____

Value on date of marriage: \$_____

Current value (as of _____): \$_____

Designated beneficiary: _____

Balance of loan against policy: \$

7. **Brokerage/Mutual Fund Accounts**

7.1. Name of brokerage firm: _____
 Address of brokerage firm: _____
 Name account held in: _____
 Name of Account: _____
 Account number: _____
 Community value of account (as of _____): \$_____

<u>Sub-account Names</u>	<u>Sub-account Numbers</u>	<u>Community value of accounts (as of _____)</u>
_____	_____	\$_____
_____	_____	_____

7.2. Name of brokerage firm: _____
 Address of brokerage firm: _____
 Name account held in: _____
 Name of Account: _____
 Account number: _____
 Community value of account (as of _____): \$_____

<u>Sub-account Names</u>	<u>Sub-account Numbers</u>	<u>Community value of accounts (as of _____)</u>
_____	_____	\$_____
_____	_____	_____

8. Publicly Traded Stocks, Bonds, and Other Securities

8.1. Name of security: _____
 Number of shares: _____
 Type of security:
 Certificate numbers: _____

In possession of: _____

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

Name of exchange on which listed: _____

Pledged as collateral?

8.2. Name of security: _____

Number of shares: _____

Type of security:

Certificate numbers: _____

In possession of: _____

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

Name of exchange on which listed: _____

Pledged as collateral?

9. Closely Held Business Interests

9.1. Name of business: _____

Address: _____

Type of business organization: _____

Percentage of ownership: _____%

Number of shares owned: _____

Value (as of _____): _____

Balance of accounts receivable if on cash accounting basis: _____

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

10. Money Owed to Me or My Spouse

10.1. Name of debtor: _____

Debtor's relationship to you: _____

Is debt evidenced in writing?

Is debt secured?

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

11. Household Furniture, Furnishings, and Fixtures

11.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$_____

11.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$_____

12. Electronics and Computers

12.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$_____

12.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$_____

13. Antiques, Artwork, and Collections

13.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$_____

13.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

14. Miscellaneous Sporting Goods and Firearms

14.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

14.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

15. Jewelry and Other Personal Items

15.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

15.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

16. Livestock

16.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

16.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
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_____ \$ _____

17. Club Memberships

17.1. Name of club: _____
Name membership held in: _____
Account number: _____
Current value (as of _____): \$ _____
Method of valuation: _____

18. Travel Award Benefits

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

19. Miscellaneous Assets

19.1. In possession of husband:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

19.2. In possession of wife:

<u>Description of Asset</u>	<u>Value</u>
_____	\$ _____

20. Contingent Assets

20.1. Nature of claim: _____
Amount of claim: \$ _____

21. Community Liabilities

21.A. Credit Cards and Charge Accounts

21.A.1. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

Balance as of _____: <\$_____>

21.A.2. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

Balance as of _____: <\$_____>

21.A.3. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

Balance as of _____: <\$_____>

21.A.4. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

Balance as of _____: <\$_____>

21.A.5. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

Balance as of _____: <\$_____>

21.B. Attorney's Fees in This Case

21.B.1. Husband (as of _____): <\$_____>

21.B.2. Wife (as of _____): <\$_____>

21.C. Other Professional Fees in This Case

21.C.1. Husband (as of _____): <\$_____>

21.C.2. Wife (as of _____): <\$_____>

21.D. Other Liabilities Not Otherwise Listed in This Inventory

21.D.1. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing?

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

Security, if any:

21.D.2. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing?

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

Security, if any:

21.D.3. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing?

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

Security, if any:

21.D.4. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing?

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

Security, if any:

21.D.5. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing?

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

Security, if any:

21.E. Reimbursement Claims against Community Estate

21.E.1. Reimbursement claim by husband's separate estate against community estate:

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

21.E.2. Reimbursement claim by wife's separate estate against community estate:

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

21.F. Contingent Liabilities

21.F.1. Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: <\$_____>

Nature of contingency: _____

Separate Estates of the Parties

22. Separate Assets of Husband -

23. Liabilities of Husband's Separate estate -

24. Separate Assets of Wife

25. Liabilities of Wife's Separate Estate -

Children's Property

26. Children's Accounts

26.1. Name of financial institution: _____

Name of account: _____

Account number: _____

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

Name of minor for whom funds were deposited: _____

26.2. Name of financial institution: _____

Name of account: _____

Account number: _____

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

Name of minor for whom funds were deposited: _____

27. Children's Other Property

27.1. Description of Asset: _____

Value of Asset (as of _____): \$ _____

Name of minor for whom asset is held: _____

27.2. Description of Asset: _____

Value of Asset (as of _____): \$ _____

Name of minor for whom asset is held: _____

Trust and Estate Assets

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

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

Description of assets: _____

Name and title of fiduciary: _____, _____

Name of owner of beneficial interest: _____

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

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

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

Description of assets: _____

Name and title of fiduciary: _____, _____

Name of owner of beneficial interest: _____

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

