

P O W E R | D A L E Y  
P L L C

CLIENT NAME: \_\_\_\_\_

CLIENT QUESTIONNAIRE - Inventory and Appraisalment.

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: \_\_\_\_\_  
\_\_\_\_\_

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:\$ \_\_\_\_\_

1.3. 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. 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 \_\_\_\_\_):  
\$ \_\_\_\_\_

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



13.2. 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: \$ \_\_\_\_\_

13.3. 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: \$ \_\_\_\_\_

13.4. 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: \$ \_\_\_\_\_

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

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

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

22.2. Name of airline: \_\_\_\_\_

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

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. Claims for Economic Contribution of Community Estate - OMITTED as of 2009**

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

28.1. Nature of claim: \_\_\_\_\_

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

28.2. Nature of claim: \_\_\_\_\_

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

29. Community Liabilities

29.A. Credit Cards and Charge Accounts

29.A.1. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_ >

29.A.2. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_ >

29.A.3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_ >

29.A.4. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name(s) on account: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Balance as of \_\_\_\_\_ [date of separation]:  
<\$ \_\_\_\_\_ >



29.A.5. Name of creditor: \_\_\_\_\_  
 Account number: \_\_\_\_\_  
 Name(s) on account: \_\_\_\_\_  
 Current balance (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >  
 Balance as of \_\_\_\_\_ [date of separation]:  
 <\$ \_\_\_\_\_ >

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

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

29.B.2. Amount owed in any previous tax year:  
 <\$ \_\_\_\_\_ >  
 [describe liability, e.g., federal income tax/property taxes]  
 Amount owed for current year \_\_\_\_\_:  
 <\$ \_\_\_\_\_ >

29.C. *Attorney's Fees in This Case*

29.C.1. Husband (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >

29.C.2. Wife (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >

29.D. *Other Professional Fees in This Case*

29.D.1. Husband (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >

29.D.2. Wife (as of \_\_\_\_\_):  
 <\$ \_\_\_\_\_ >

29.E. *Other Liabilities Not Otherwise Listed in This Inventory* (e.g., loans, margin accounts, if not previously disclosed)

29.E.1. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No]  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Security, if any: \_\_\_\_\_

29.E.2. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No]  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Security, if any: \_\_\_\_\_

29.E.3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No]  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >  
Security, if any: \_\_\_\_\_

29.F. *Reimbursement Claims against Community Estate Other than for Economic Contribution*

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

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

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

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

Basis of Claim: \_\_\_\_\_

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

29.G. *Economic Contribution Claims against Community Estate – Omitted Since 2009*

29.H. *Pledges (include charitable, church and school related)*

29.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: \_\_\_\_\_

29.I. *Contingent Liabilities (e.g., lawsuit against either party, guaranty either party may have signed)*

29.I.1. Name of creditor: \_\_\_\_\_

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

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

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

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

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

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

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



Separate Estates of the Parties

30. 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)

30.1. Description of asset: \_\_\_\_\_
Date property acquired: \_\_\_\_\_
How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

30.2. Husband's separate reimbursement claim against community estate other than for economic contribution:
Basis of claim: \_\_\_\_\_
Amount claimed (as of \_\_\_\_\_):
\$ \_\_\_\_\_

30.3. Husband's separate reimbursement claim against wife's separate estate other than for economic contribution:
Basis of claim: \_\_\_\_\_
Value (as of \_\_\_\_\_):
\$ \_\_\_\_\_

31. Liabilities of Husband's Separate Estate

31.1. Description of liability: \_\_\_\_\_
Date of liability: \_\_\_\_\_
How liability acquired: \_\_\_\_\_
Amount of liability (as of \_\_\_\_\_):
<\$ \_\_\_\_\_ >

31.2. Wife's separate reimbursement claim against husband's separate estate other than for economic contribution:
Basis of claim: \_\_\_\_\_
Value (as of \_\_\_\_\_):
\$ \_\_\_\_\_

31.3. Community estate's reimbursement claim against husband's separate estate other than for economic contribution:
Basis of claim: \_\_\_\_\_

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

**32. 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)

32.1. Description of asset: \_\_\_\_\_  
Date property acquired: \_\_\_\_\_  
How acquired (e.g., by gift, by devise, by descent, or owned before marriage): \_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

32.2. Wife's separate reimbursement claim against community estate other than for economic contribution:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

32.3. Wife's separate reimbursement claim against husband's separate estate other than for economic contribution:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

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

33.1. Description of liability: \_\_\_\_\_  
Date of liability: \_\_\_\_\_  
How liability acquired: \_\_\_\_\_  
Amount of liability (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_ >

33.2. Husband's separate property reimbursement claim against wife's separate estate other than for economic contribution:  
Basis of Claim: \_\_\_\_\_  
Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.3. Community estate's reimbursement claim against wife's separate estate other than for economic contribution:  
Basis of Claim: \_\_\_\_\_  
Amount claimed (as of \_\_\_\_\_):

\$

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



\$

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