

**Inventory and Appraisal of \_\_\_\_\_**

\_\_\_\_\_, 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)

1.1. Street address:

County of location:

Description of improvements, if any:

Legal description:

Current fair market value (as of [date]): \$[amount]

Name of mortgage company and account number, if any:

Current balance of mortgage (as of [date]): \$[amount]

Other liens against property (as of [date]): \$[amount]

Current net equity in property: \$[amount]

**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 [date]): \$[amount]

**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. 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 [date]): \$[amount]

3.2. 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 [date]): \$[amount]

**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 [date]): \$[amount]

Value of community interest in each account (and subaccounts if any) (as of [date]): \$[amount]

**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 [date]): \$[amount]

Value of community interest (as of [date]): \$[amount]

**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 [date]): \$[amount]

Value of community interest (as of [date]): \$[amount]

## 7. Bonuses

7.1. Name of company:

Date bonus expected to be paid:

Anticipated amount of bonus: \$[amount]

**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 [date]): \$[amount]

Balance of accounts receivable if on cash basis accounting: \$[amount]

Balance of liabilities if on cash basis accounting: <\$[amount]>

## 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 [date]): \$[amount]

Balance of loan against plan: \$[amount]

Value of community interest in plan (as of [date]): \$[amount]

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 [date]): \$[amount]

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 [date]): \$[amount]

Value of community interest (as of [date]): \$[amount]

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: \$[amount]

Value of community interest in plan (as of [date]): \$[amount]

Percentage of plan that is community: [percent]%

#### 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 [date]): \$[amount]

#### 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 [date]): \$[amount]

### 11. Insurance and Annuities

#### 11.A. Life Insurance

##### 11.A.1. Name of insurance company:

Policy number:

Name of insured:

Name of owner:

Type of insurance: [term/whole/universal]:

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

Date of issue:

Face amount:  
Cash surrender value on date of marriage:  
Current cash surrender value: \$[amount]  
Designated beneficiary:  
Balance of loan against policy: \$[amount]

11.B. Annuities

11.B.1. Name of company:

Policy number:  
Name of annuitant:  
Name of owner:  
Type of annuity:  
Amount of premiums [monthly/quarterly/semiannually]:  
\$[amount]  
Date of issue:  
Face amount:  
Designated beneficiary:  
Value on date of marriage:  
Current value (as of [date]): \$[amount]  
Balance of loan against policy: \$[amount]  
Value of community interest (as of [date]): \$[amount]

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

12.1. Year:

Make:  
Model:  
Name on certificate of title:  
In possession of:  
Vehicle identification number:  
Name of creditor if loan against vehicle:  
Current balance (as of [date]): \$[amount]  
Current net equity in vehicle: \$[amount]

12.2. Year:

Make:

Model:

Name on certificate of title:

In possession of:

Vehicle identification number:

Name of creditor if loan against vehicle:

Current balance (as of [date]): \$[amount]

Current net equity in vehicle: \$[amount]

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

13.1. Name of debtor:

Debtor's relationship to you:

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of [date]): \$[amount]

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

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

**15. Electronics and Computers**

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

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

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

**17. Miscellaneous Sporting Goods and Firearms**

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

**18. Jewelry and Other Personal Items**

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

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

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

Description and value of each item in possession of husband: \$[amount]

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

Description and value of each item in possession of wife: \$[amount]

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

21.1. Name of airline:

Account number:

Current number of miles (as of [date]):

Current value (if any): \$[amount]

**22. Community Liabilities**

22.A. Credit Cards and Charge Accounts

22.A.1. Name of creditor:

Account number:

Name(s) on account:

Current balance (as of [date]): <\$[amount]>

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

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

22.B.1. Amount owed in any previous tax year: <\$[amount]>

[describe liability, e.g., federal income tax/property taxes]

22.C. Attorney's Fees in This Case



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

22.E.1. Name of creditor:

Account number:

Party incurring liability:

Is loan evidenced in writing? [Yes/No]

Current balance (as of [date]): <\${amount}>

Security, if any:

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

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

Basis of claim:

Amount of claim (as of [date]): <\${amount}>

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

Basis of claim:

Amount of claim (as of [date]): <\${amount}>

#### 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 [date]): \${amount}

29.2. Description of asset:

Date property acquired:

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

Value (as of [date]): \${amount}

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

30.1. Description of liability:

Date of liability:

How liability acquired:

Amount of liability (as of [date]): <\${amount}>

**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 [date]): \$[amount]

31.2. Description of asset:

Date property acquired:

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

Value (as of [date]): \$[amount]

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

32.1. Description of liability:

Date of liability:

How liability acquired:

Amount of liability (as of [date]): <\${amount}>

**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 [date]): \$[amount]

**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 [date]): \$[amount]

**Verification**

I, \_\_\_\_\_, state on oath that, to the best of my knowledge and belief, this inventory and appraisal 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 therefore;
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.

\_\_\_\_\_  
Party name

SIGNED under oath before me on \_\_\_\_\_.

\_\_\_\_\_  
Notary Public, State of Texas