

NO. \_\_\_\_\_

IN THE MATTER OF  
THE MARRIAGE OF

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§  
§  
§

IN THE DISTRICT COURT

PETITIONER  
AND  
RESPONDENT

\_\_\_\_\_ JUDICIAL DISTRICT

COUNTY, TEXAS

**Inventory and Appraisement of \_\_\_\_\_**

\_\_\_\_\_ submits this inventory and appraisement 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:

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]**

**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]

**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 assets:

Value: \$[amount]

10.2. Wife—description of assets:

Value: \$[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]

**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]
- 20. Club Memberships**
- 20.1. Name of club:
- Name membership held in:
- Account number:
- Current value (as of [date]): \$[amount]
- Method of valuation:
- 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. 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)

22.1. In possession of husband (attach separate sheet if necessary):  
  
Description and value of each item in possession of husband: **[\$amount]**

22.2. In possession of wife (attach separate sheet if necessary):  
  
Description and value of each item in possession of wife: **[\$amount]**

**23. Safe-Deposit Boxes**

23.1. Name of financial institution or other depository:  
  
Box number:  
  
Names of persons with access to contents:  
  
Items in safe-deposit box:

**24. Storage Facilities**

24.1. Name and location:  
  
Unit number:  
  
Terms and length of lease:  
  
Names of persons with access to contents:  
  
Items in storage unit:

**25. Community Claim for Reimbursement**

25.1. Reimbursement claim against husband's separate estate:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

25.2. Reimbursement claim against wife's separate estate:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

**26. Equitable Interest(s) of Community Estate**

26.1. Equitable interest due to financial contribution of community property to husband's separate estate:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

26.2. Equitable interest due to financial contribution of community property to wife's separate estate:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

26.3. Equitable interest resulting from use of community property to pay debts on husband's separate property:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

26.4. Equitable interest resulting from use of community property to pay debts on wife's separate property:  
Basis of claim:  
Amount claimed (as of [date]): \$[amount]

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

27.1. Nature of claim:  
Amount of claim \$[amount]

**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 **[date]**): <\${**amount**}>

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

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

28.B.1. Amount owed in any previous tax year: <\${**amount**}>  
**[describe liability, e.g., federal income tax/property taxes]**

Amount owed for current year **[year]**: <\${**amount**}>

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

28.C.1. Husband (as of **[date]**): <\${**amount**}>

28.C.2. Wife (as of **[date]**): <\${**amount**}>

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

28.D.1. Husband (as of **[date]**): <\${**amount**}>

28.D.2. Wife (as of **[date]**): <\${**amount**}>

*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 **[date]**): <\${**amount**}>

Security, if any:

*28.F. Reimbursement Claims against Community Estate*

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

Basis of claim:

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

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

Basis of claim:

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

*28.G. Equitable Interest Claims against Community Estate*

28.G.1. Equitable interest due to financial contribution  
of husband's separate property to  
community estate:

Basis of claim:

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

28.G.2. Equitable interest due to financial contribution  
of wife's separate property to  
community estate:

Basis of claim:

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

28.G.3. Equitable interest resulting from use of  
husband's separate property to pay  
community property debts:

Basis of claim:

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

28.G.4. Equitable interest resulting from use of  
wife's separate property to pay  
community property debts:

Basis of claim:

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

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

28.H.1. Name and address of recipient:

Date of pledge:

Total amount of pledge: <\${amount}>

Is pledge payable in installments? [Yes/No]

Date each installment payment is due:

Amount of each installment:

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

28.I.1. Name of creditor:

Name of person primarily liable:

Amount of contingent liability: <\${amount}>

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 [date]): \${amount}

29.2. Husband's separate reimbursement claim against  
community estate:

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

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

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

29.4. Equitable interest claim due to financial contribution of  
husband's separate estate to community estate:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 29.5. Equitable interest claim due to financial contribution of husband's separate estate to wife's separate estate:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 29.6. Equitable interest claim resulting from use of husband's separate property to pay debts on community property:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 29.7. Equitable interest claim resulting from use of husband's separate property to pay debts on wife's separate property:

Basis of claim:

Amount of claim (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]>**

- 30.2. Wife's separate property reimbursement claim against husband's separate estate:

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

- 30.3. Community estate's reimbursement claim against husband's separate estate:

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

- 30.4. Equitable interest claim due to financial contribution of community property to husband's separate estate:



- Basis of claim:
- Amount of claim (as of **[date]**): <\${**amount**}>
- 30.5. Equitable interest claim due to financial contribution of wife's separate property to husband's separate estate:
- Basis of claim:
- Amount of claim (as of **[date]**): <\${**amount**}>
- 30.6. Equitable interest claim resulting from use of community property to pay debts on husband's separate property:
- Basis of claim:
- Amount of claim (as of **[date]**): <\${**amount**}>
- 30.7. Equitable interest claim resulting from use of wife's separate property to pay debts on husband's separate property:
- Basis of claim:
- Amount of claim (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. Wife's separate reimbursement claim against community estate:
- Value (as of **[date]**): \${**amount**}
- 31.3. Wife's separate reimbursement claim against husband's separate estate:
- Value (as of **[date]**): \${**amount**}
- 31.4. Equitable interest claim due to financial contribution of wife's

separate estate to community estate:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 31.5. Equitable interest claim due to financial contribution of wife's separate estate to husband's separate estate:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 31.6. Equitable interest claim resulting from use of wife's separate property to pay debts on community property:

Basis of claim:

Amount of claim (as of **[date]**): **[\$[amount]**

- 31.7. Equitable interest claim resulting from use of wife's separate property to pay debts on husband's separate property:

Basis of claim:

Amount of claim (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]>**

- 32.2. Husband's separate property reimbursement claim against wife's separate estate:

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

- 32.3. Community estate's reimbursement claim against wife's separate estate:

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

- 32.4. Equitable interest claim due to financial contribution of community property to wife's separate estate:

Basis of claim:

Amount of claim (as of [date]):

<\${amount}>

- 32.5.     Equitable interest claim due to financial contribution  
            of husband's separate property to wife's separate estate:

Basis of claim:

Amount of claim (as of [date]):

<\${amount}>

- 32.6.     Equitable interest claim resulting from use of husband's  
            separate property to pay debts on wife's separate estate:

Basis of claim:

Amount of claim (as of [date]):

<\${amount}>

- 32.7.     Equitable interest claim resulting from use of community  
            property to pay debts on wife's separate property:

Basis of claim:

Amount of claim (as of [date]):

<\${amount}>

### **Child[ren]'s Property**

33.     **Child[ren]'s Property** (e.g., custodial accounts under the Texas  
Uniform Gifts to Minors Act or Uniform Transfers to Minors Act)

- 33.1.     Name of financial institution:

Address of financial institution:

Name of account:

Account number:

Amount on deposit (as of [date]):

\${amount}

Name of minor for whom funds were deposited:

### **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]**