

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

IN THE MATTER OF  
THE MARRIAGE OF

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§

IN THE DISTRICT COURT

\_\_\_\_\_  
AND

\_\_\_\_ JUDICIAL DISTRICT

\_\_\_\_\_  
AND IN THE INTEREST OF

\_\_\_\_\_  
MINOR CHILDREN

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

