

NO.

IN THE MATTER OF  
THE MARRIAGE OF

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IN THE COURT

AT LAW

AND IN THE INTEREST OF

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** (include any property purchased by contract for deed, such as Texas Veterans Land Board property, property purchased in recreational developments, and time-shares)

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:  
\_\_\_\_\_; account number \_\_\_\_\_

Current balance of mortgage (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Other liens against property: \_\_\_\_\_

Current net equity in property: \$ \_\_\_\_\_

**2. 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)

1. Cash on hand (as of \_\_\_\_\_): \$ \_\_\_\_\_

**3. Brokerage/Mutual Fund Accounts**

1. Name of brokerage firm/mutual fund:

\_\_\_\_\_

Address of brokerage firm/mutual fund:

\_\_\_\_\_  
\_\_\_\_\_

Name account held in: \_\_\_\_\_

Name of account: \_\_\_\_\_

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

Margin loan balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

Value of community interest in account (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**4. Stock Options** (include all exercisable nonexercisable, vested, and nonvested stock options regardless of any restrictions on transfer)

1. Name of company:

\_\_\_\_\_

Date of option/grant: \_\_\_\_\_

Vesting schedule: \_\_\_\_\_

Number of options: \_\_\_\_\_

Are the options exercisable? \_\_\_\_\_

Are the options registered? \_\_\_\_\_

Current stock price: \$ \_\_\_\_\_

Strike price: \$ \_\_\_\_\_

Current net market value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

**5. Retirement Benefits**

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))

1. Exact name of plan: \_\_\_\_\_

Name and address of plan administrator:

\_\_\_\_\_

Employee: \_\_\_\_\_

Employer: \_\_\_\_\_

Starting date of creditable service:

\_\_\_\_\_

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

**B. IRA/SEP**

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

**6. Insurance and Annuities**

**A. Life Insurance**

1. 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: \_\_\_\_\_

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

**B. Annuities**

1. Name of company: \_\_\_\_\_  
Policy number: \_\_\_\_\_

Name of annuitant: \_\_\_\_\_

Name of owner: \_\_\_\_\_

Type of annuity: \_\_\_\_\_

Amount of premiums monthly: \$ \_\_\_\_\_

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

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

1. Year: \_\_\_\_\_  
Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Fair market value of vehicle: \$ \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_): \$ \_\_\_\_\_  
Current net equity in vehicle: \$ \_\_\_\_\_
2. Year: \_\_\_\_\_  
Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification number: \_\_\_\_\_  
Fair market value of vehicle: \$ \_\_\_\_\_  
Name of creditor if loan against vehicle: \_\_\_\_\_  
Current balance (as of \_\_\_\_\_): \$ \_\_\_\_\_

Current net equity in vehicle: \$ \_\_\_\_\_

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

1. In possession of husband:

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

2. In possession of wife:

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_

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

**9. Electronics and Computers**

1. In possession of husband:

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

2. In possession of wife:

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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

Asset: \_\_\_\_\_

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



**10. Jewelry and Other Personal Items**

1. In possession of husband:

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

2. In possession of wife:

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

Asset: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

**11. Community Liabilities**

A. *Credit Cards and Charge Accounts*

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

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

Name(s) on account: \_\_\_\_\_

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

Balance as of \_\_\_\_\_: <\$ \_\_\_\_\_ >

B. *Attorney's Fees in This Case*

1. Description of fee: \_\_\_\_\_

Amount owed (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

**Separate Estates of the Parties**

No separate assets or liabilities.

**Child's Property**

12. **Child's Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act): None

**Trust and Estate Assets**

13. **Assets Held by Either Party for the Benefit of Another** (include formal and informal trusts): None
14. **Assets Held for the Benefit of Either Party as a Beneficiary** (include formal and informal trusts): None

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