

INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT

Client's Name: _____

Date: _____

General Instructions

Accurate information concerning property and debts is very important in divorce cases. Please fill out the attached form as completely as you can, drawing on any source of information to which you have access. Do not enlist your spouse's help unless I specifically permit it. DO NOT LET ANYONE SEE THIS DOCUMENT. THIS PREPARATION OF YOUR INVENTORY AND APPRAISEMENT IS A CONFIDENTIAL MATTER BETWEEN YOU AND YOUR ATTORNEY. Be cautious: You and your spouse are now legal adversaries, and you should verify all information on your own. When it comes to questions of the present value of property, you should make your own independent estimate.

The attached form provides for only a few items under each type of property. If you need to provide additional information, photocopy an extra page or use a separate piece of paper and number the information as it is numbered on the inventory. If you do not know the answer to an item, do not leave it blank; write "I don't know."

This task will not be easy. Do not expect to complete the form at one sitting. Be assured, however, that your effort is necessary and worthwhile.

Property Division

In addition to factual data, I need to know your wishes about division of the property. Please indicate your wishes in the left margin of the form by placing a "W" next to items you want to go to the wife and an "H" next to items you want to go to the husband.

Definitions

Separate Property - Property acquired by a spouse before marriage and property a

spouse acquired individually during marriage by gift or inheritance or as a result of personal injury are considered to be separate property of that spouse. If either you or your spouse has any property you think is separate property, complete the section marked "Separate Estates of the Parties."

Community Property - All property that is not separate property is community property.

Fair Market Value - A generally accepted definition of fair market value is the price at which the asset would change hands between a willing seller, under no compulsion to sell, and a willing buyer, under no compulsion to buy, with both parties having reasonable knowledge of the relevant facts. Use this value whenever possible. If an asset has no fair market value, state the actual value of the asset to you considering its present condition.

Copies of Documents to Be Returned

If an asset has a statement of account, return a copy of the current statement of account with this Preparation of Inventory and Appraisal. If an asset has a title document (deed, deed of trust, certificate of title to motor vehicle), return a copy with this Preparation of Inventory and Appraisal. If an asset has any document that can clearly identify it, return a copy with this Preparation of Inventory and Appraisal.

Here is a checklist of some of the copies of items you should return with this Preparation of Inventory and Appraisal:

1. financial institution statements;
2. bank statements;
3. annuity statements;
4. IRA statements;

5. SEP statements;
6. certificate of deposit statements;
7. retirement benefits statements of account;
8. life insurance policies and premium notices;
9. broker statements;
10. deeds;
11. deeds of trust;
12. mortgage company payment coupon books (usually one page is enough);
13. certificates of title to motor vehicles;
14. stocks;
15. last statement from each creditor, including credit card statements;
16. appraisals;
17. any other documents that may lead to the discovery of assets or liabilities.

Full Disclosure

Finally, I will rely on this Preparation of Inventory and Appraisement in the case. If you omit any asset, the court could set it aside to your spouse now or at a later date. If you omit a liability, you may be solely responsible for it. By your signature below, you verify to me that these are all the assets and liabilities of community and separate property of which you have knowledge.

Verification

"I have read these instructions and I state that all the community- and separate-property assets and liabilities are fully disclosed on the attached Preparation of Inventory and Appraisement of _____."

_____(Client)

Date: _____

INVENTORY AND APPRAISEMENT 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 in which the parties own the mineral estate, separate and apart from the surface estate, such as oil and gas leases; also include any property purchased by contract for deed, such as Texas Veterans Land Board property and property purchased in recreational developments)

1.1. Street address: _____

County of location: _____

Description of improvements, if any: _____

Legal description: _____

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

Name of mortgage company and account number, if any: _____

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

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 _____[date]): \$ _____

Name of mortgage company and account number, if any: _____

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

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 _____[date]): \$ _____

Name of mortgage company and account number, if any: _____

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

Other liens against property: _____

Current net equity in property: \$ _____

2. Cash and Accounts with Financial Institutions (include cash, travelers checks, money orders, and accounts with commercial banks, savings and loan associations, and credit unions; exclude accounts with brokerage houses and any form of retirement account)

2.1. 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]): \$ _____

2.2. 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]): \$ _____

2.3. 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]): \$ _____

2.4. 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 _____[date]): \$_____

2.5. 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 _____[date]): \$_____

3. Motor Vehicles, Boats, Airplanes, Cycles, etc. (exclude company-owned vehicles)

3.1. Year:_____

Model:_____

Name on certificate of title:_____

In possession of:_____

Vehicle identification number:_____

Name of creditor if loan against vehicle:_____

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

Current net equity in vehicle: \$_____

3.2. Year:_____

Model:_____

Name on certificate of title:_____

In possession of:_____

Vehicle identification number:_____

Name of creditor if loan against vehicle: _____

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

Current net equity in vehicle: \$ _____

3.3 Year: _____

Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Name of creditor if loan against vehicle: _____

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

Current net equity in vehicle: \$ _____

3.4. Year: _____

Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Name of creditor if loan against vehicle: _____

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

Current net equity in vehicle: \$ _____

3.5. Year: _____

Model: _____

Name on certificate of title: _____

In possession of: _____

Vehicle identification number: _____

Name of creditor if loan against vehicle: _____

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

Current net equity in vehicle: \$ _____

4. Retirement Benefits

4.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 § 414(l))

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 _____ [date]): \$ _____

Current community value (as of _____ [date]): \$ _____

Balance of loan against plan: \$ _____

4.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 _____ [date]): \$ _____

Current community value (as of _____ [date]): \$ _____

Balance of loan against plan: \$ _____

4.B. *Defined Benefit Plan* (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula. IRC § 414(j))

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 _____ [date]):

\$ _____

4.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: _____

Current value of community interest in plan (as of _____ [date]):

\$ _____

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 _____ [date]): \$ _____

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 _____ [date]): \$ _____

4.D. *Military Benefits*

4.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 _____ [date]): \$ _____

Percentage of plan that is community: _____ %

4.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 _____[date]): \$ _____

Percentage of plan that is community: _____%

4.E. *Nonqualified Plans*

4.E.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 _____[date]):
\$ _____

4.E.2. 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 _____[date]):
\$ _____

4.F. *Government Benefits* (civil service, teacher, railroad, state and local)

4.F.1. Name of plan:

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 _____[date]):

\$ _____

4.F.2. Name of plan:

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 _____[date]):

\$ _____

5. Other Deferred Compensation Benefits (e.g., workers' compensation, disability benefits, bonuses and other "special payments," employee stock options, and other forms of compensation)

5.1. Husband

Description of Asset

Value

5.2. Wife

Description of Asset

Value

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: [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: \$ _____

6.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: \$ _____

6.B. Annuities

6.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: _____

Value on date of marriage: _____

Current value (as of _____ [date]): \$ _____

Designated beneficiary: _____

Balance of loan against policy: \$ _____

6.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: _____

Value on date of marriage: _____

Current value (as of _____ [date]): \$ _____

Designated beneficiary: _____

Balance of loan against policy: \$ _____

7. Brokerage/Mutual Fund Accounts (include accounts not previously disclosed in this inventory)

7.1. Name of brokerage firm: _____

Address of brokerage firm: _____

Name account held in: _____

Name of account (and subaccounts if any): _____

Account number (and numbers of subaccounts if any): _____

Community value of each account (and subaccounts if any)

(as of _____ [date]): \$ _____

7.2. Name of brokerage firm: _____

Address of brokerage firm: _____

Name account held in: _____

Name of account (and subaccounts if any): _____

Account number (and numbers of subaccounts if any): _____

Community value of each account (and subaccounts if any)

(as of _____[date]): \$ _____

7.3. Name of brokerage firm: _____

Address of brokerage firm: _____

Name account held in: _____

Name of account (and subaccounts if any): _____

Account number (and numbers of subaccounts if any): _____

Community value of each account (and subaccounts if any)

(as of _____[date]): \$ _____

8. Publicly Traded Stocks, Bonds, and Other Securities (include securities not previously disclosed in this inventory)

8.1. Name of security: _____

Number of shares: _____

Type of security: [common stock/preferred stock/bond/other security]: _____

Certificate numbers: _____

In possession of: _____

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

Name of exchange on which listed: _____

Pledged as collateral? [Yes/No]

8.2. Name of security: _____

Number of shares: _____

Type of security: [common stock/preferred stock/bond/other security]: _____

Certificate numbers: _____

In possession of: _____

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

Name of exchange on which listed: _____

Pledged as collateral? [Yes/No]

9. Closely Held Business Interests (include sole proprietorships, professional practices, partnerships, joint ventures, and other nonpublicly traded corporate business entities, and so forth)

9.1. Name of business: _____

Address: _____

Type of business organization: _____

Percentage of ownership: _____

Number of shares owned (if applicable): _____

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

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 (include any expected federal or state income tax refund but do not include receivables connected with a business)

10.1. 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]): \$ _____

10.2. 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 _____[date]): \$ _____

11. Household Furniture, Furnishings, and Fixtures

11.1. In possession of husband (attach separate sheet by room if necessary):
Description and value of each item in possession of husband: _____

11.2. In possession of wife (attach separate sheet by room if necessary):
Description and value of each item in possession of wife: _____

12. Electronics and Computers

12.1. In possession of husband (attach separate sheet if necessary):
Description and value of each item in possession of husband: _____

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

Description and value of each item in possession of wife: _____

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

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

Description and value of each item in possession of husband: _____

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

Description and value of each item in possession of wife: _____

14. Miscellaneous Sporting Goods and Firearms

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

Description and value of each item in possession of husband: _____

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

Description and value of each item in possession of wife: _____

15. Jewelry and Other Personal Items

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

Description and value of each item in possession of husband: _____

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

Description and value of each item in possession of wife: _____

16. Livestock (include cattle, horses, and so forth)

16.1. In possession of husband (attach separate sheet if necessary):
Description and value of each item in possession of husband: _____

16.2. In possession of wife (attach separate sheet if necessary):
Description and value of each item in possession of wife: _____

17. Club Memberships

17.1. Name of club: _____

Name membership held in: _____

Account number: _____

Current value (as of _____ [date]): \$ _____

Method of valuation: _____

17.2. Name of club: _____

Name membership held in: _____

Account number: _____

Current value (as of _____ [date]): \$ _____

Method of valuation: _____

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

18.1. Name of airline: _____

Account number: _____

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

Value (if any): \$ _____

18.2. Name of airline: _____

Account number: _____

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

Value (if any): \$ _____

19. Miscellaneous Assets (intellectual property, licenses, crops, cemetery lots, gold or silver coins not part of a collection described elsewhere in this inventory, tax overpayments, loss carry-forward deductions)

19.1. In possession of husband (attach separate sheet if necessary):
Description and value of each item in possession of husband: _____

19.2. In possession of wife (attach separate sheet if necessary):
Description and value of each item in possession of wife: _____

20. Community Claim for Reimbursement

20.1. Reimbursement claim against husband's separate estate:

Basis of claim: _____

Amount claimed: \$ _____

20.2. Reimbursement claim against wife's separate estate:

Basis of claim: _____

Amount claimed: \$ _____

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

21.1. Nature of claim: _____

Amount of claim: \$ _____

21.2. Nature of claim: _____

Amount of claim: \$ _____

22. Community Liabilities

22.A. Credit Cards and Charge Accounts

1. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

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

2. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

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

3. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

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

4. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

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

5. Name of creditor: _____

Account number: _____

Name(s) on account: _____

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

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

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

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

Amount owed for current year _____: <\$ _____ >

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

22.C.1. Husband (as of _____ [date]): <\$ _____ >

22.C.2. Wife (as of _____ [date]): <\$ _____ >

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

22.D.1. Husband (as of _____ [date]): <\$ _____ >

22.D.2. Wife (as of _____[date]): <\$ _____>

22.E. *Other Liabilities Not Otherwise Listed in This Inventory* (e.g., loans, margin accounts)

22.E.1. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing? [Yes/No]

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

Security, if any: _____

22.E.2. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing? [Yes/No]

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

Security, if any: _____

22.E.3. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing? [Yes/No]

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

Security, if any: _____

22.F. *Reimbursement Claims against Community Estate*

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

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

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

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

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

22.G.1. Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: <\$_____>

Nature of contingency: _____

22.G.2. Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: <\$_____>

Nature of contingency: _____

Separate Estates of the Parties

23. 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)

23.1. Description of asset: _____

Date property acquired: _____

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

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

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

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

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

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

24. Liabilities of Husband's Separate Estate

24.1. Description of liability: _____

Date of liability: _____

How liability acquired: _____

Amount of liability (as of [date]): <\$ _____ >

24.2. Wife's separate reimbursement claim against husband's separate estate:

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

24.3. Community estate's reimbursement claim against husband's separate estate:

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

25. 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)

25.1. Description of asset: _____

Date property acquired: _____

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

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

25.2. Wife's separate reimbursement claim against community estate:

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

25.3. Wife's separate reimbursement claim against husband's separate estate:

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

26. Liabilities of Wife's Separate Estate

26.1. Description of liability:

Date of liability: _____

How liability acquired: _____

Amount of liability (as of _____ [date]): <\$ _____ >

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

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

26.3. Community estate's reimbursement claim against wife's separate estate:

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

Children's Property

27. Children's Accounts (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act)

27.1. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____ [date]): \$ _____

Name of minor for whom funds were deposited: _____

27.2. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____ [date]): \$ _____

Name of minor for whom funds were deposited: _____

27.3. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____[date]): \$ _____

Name of minor for whom funds were deposited: _____

27.4. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit (as of _____[date]): \$ _____

Name of minor for whom funds were deposited: _____

28. Children's Other Property (e.g., property other than custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act)

28.1. Description of Asset: _____

Value of the asset:(as of _____[date]): \$ _____

Name of minor for whom asset is held: _____

28.2. Description of Asset: _____

Value of the asset:(as of _____[date]): \$ _____

Name of minor for whom asset is held: _____

28.3. Description of Asset: _____

Value of the asset:(as of _____[date]): \$ _____

Name of minor for whom asset is held: _____

28.4. Description of Asset: _____

Value of the asset:(as of _____[date]): \$ _____

Name of minor for whom asset is held:_____

Trust and Estate Assets

29. Assets Held by Either Party for the Benefit of Another (include formal and informal trusts)

29.1. 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]): \$ _____

29.2. 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 _____[date]): \$ _____

29.3. 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]): \$ _____

30. Assets Held for the Benefit of Either Party as a Beneficiary (include formal and informal trusts)

30.1. 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]): \$ _____

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 thereof;
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.

State of Texas	§
County of	§

SIGNED under oath before me on _____.

Notary Public, State of Texas