Client Name:____

Schedule of Marital Property

We will need the following information in preparing your divorce proceedings. Please answer all questions; if a question does not apply, please mark it "N/A." Please do not hesitate to ask if you have any questions.

NOTICE OF CONFIDENTIALITY

THE INFORMATION IN THIS DOCUMENT IS SUBJECT TO THE ATTORNEY–CLIENT PRIVILEGE, AS PROVIDED IN THE TEXAS RULES OF CIVIL EVIDENCE.

THE CONTENTS OF THIS DOCUMENT CONSTITUTE ATTORNEY WORK PRODUCT.

THE CONTENTS OF THIS DOCUMENT ARE CONFIDENTIAL AND ARE NOT TO BE DISCLOSED TO THIRD PERSONS OTHER THAN THOSE TO WHOM DISCLOSURE IS MADE IN FURTHERANCE OF THE RENDITION OF PROFESSIONAL LEGAL SERVICES.

INSTRUCTIONS FOR PREPARATION OF INVENTORY AND APPRAISEMENT

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 Appraisement. 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 Appraisement. If an asset has any document that can clearly identify it, return a copy with this Preparation of Inventory and Appraisement.

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

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.

____

Client

Attorney/Client-Privileged Information

1. Real Estate

1.1 Home Owned:

a. Street address:____

County of location:____

Description of improvements, if any:____________________________________

____

Legal description:____

____

Current fair market value: $______as of ________________________________

Exact name of mortgage company and account number, if any: ____________________

Current balance of mortgages: $____________________________________

a. Purchase mortgage

Name of lienholder:____________________________________

Current balance of lien: $______as of________________________

Monthly payment: $___Due date:___Int.rate:____________________

b. Second lien (pools, etc.)

Name of second lienholder:________________________________

Current balance of second lien: $___as of_____________________

Monthly payment: $___Due date:___Int. rate:____________________

c. Third lien (decrees)

Name of third lienholder:_________________________________

Current balance of third lien: $___as of_______________________

Monthly payment: $___Due date:___Int.rate:__________________________

Current net equity in property:____

Date property was acquired:____

Down payment and source of down payment:____

Exact name on title:____

Who lives in the house now?____

Who wishes to live in the house after the divorce?___________________________________

Comments:____

____

1.2 Home Not Owned:

a. Address of dwelling:____

General description of dwelling:____

Furnished?____

When did you move in?____

Who owns the property?____

Address:____

Phone:____

Rent amount: $______Due date:____

Are utilities included?______Is rent current now?____________________________________

How long is the term of lease?____

Written lease signed?____

Did you put up a deposit?_____How much? $____

How much notice to terminate lease?____

1.3 Other Real Estate:

a. General description:____

____

Location:____

Legal description:____

Other owners:____

Date acquired:________Total cost: $_____________________________________

Record title owner:____

Down payment and source of down payment:___________________________

First lienholder:____

Address:____

Amount of payment: $____Due date:_____Int.rate:________________________

Balance due: $_________as of____

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 Checking Accounts:

a. Name of financial institution:___________________________________

Address:____

Attorney/Client-Privileged Information

Account officer:____

Account number:____

Account name:____

Type of account:____

Name(s) on withdrawal cards:________________________________

Current balance: $_______as of______________________________

When account opened:_____________________________________

Source of funds:____

Use of account:____

b. Name of financial institution:________________________________

Address:____

Account officer:____

Account number:____

Account name:____

Type of account:____

Name(s) on withdrawal cards:________________________________

Current balance: $_______as of______________________________

When account opened:_____________________________________

Source of funds:____

Use of account:____

c. Name of financial institution:________________________________

Address:____

Account officer:____

Account number:____

Account name:____

Type of account:____

Name(s) on withdrawal cards:________________________________

Current balance: $________as of______________________________

When account opened:____________________________________

Source of funds:____

Use of account:____

2.2 Savings Accounts:

a. Name of financial institution:________________________________

Address:____

Account officer:____

Account number:____

Account name:____

Type of account:____

Name(s) on withdrawal cards:________________________________

Current balance: $_______as of______________________________

When account opened:____________________________________

Source of funds:____

Use of account:____

Pledged:____To:____

Reason:______________________________

b. Name of financial institution:______________________________

Address:______________________________

Account officer:______________________________

Account number:______________________________

Account name:______________________________

Type of account______________________________

Name(s) on withdrawal cards:______________________________

Current balance: $______as of______________________________

When account opened:______________________________

Source of funds:______________________________

Use of account______________________________

Pledged:________To:______________________________

Reason:______________________________

2.3 Certificates of Deposit:

a. Name of financial institution:______________________________

Address:______________________________

Account officer:______________________________

Phone:______________________________

C.D. in the name of:______________________________

Amount of C.D.: $______Interest rate:______________________________

When purchased:______When due:______________________________

Where is C.D. now____

Source of funds:____

Pledged:____To:____

Reason:____

b. Name of financial institution:____

Address:____

Account officer:____

Phone:____

C.D. in the name of:____

Amount of C.D.: $_______Interest rate:____

When purchased:______When due:____

Where is C.D. now?____

Source of funds:____

Pledged:____To:____

Reason:____

3. Motor Vehicles, Boats, Airplanes, Cycles, etc.

(Exclude company–owned vehicles.)

3.1 Vehicles Owned:

a. Year:________Model:____

Name on certificate of title:____

In possession of:____

Vehicle identification number:____

Attorney/Client-Privileged Information

Does vehicle have loan against it? ___yes___no

If yes, state:

Exact name of creditor:____

Current balance: $____as of____

Current net equity in vehicle: $_____________________________________

Date acquired:____Source of down payment:__________________________

____

Who should be awarded the vehicle in the divorce?____________________

____

b. Year:_____ Model:____

Name on certificate of title:____

In possession of:____

Vehicle identification number:____

Does vehicle have loan against it? ___yes ____no

If yes, state:

Exact name of creditor:____

Current balance: $_____as of_______________________________________

Current net equity in vehicle: $__________

Date acquired:____

Source of down payment:____

Who should be awarded the vehicle in the divorce?

____

c. Year:________ Model:______________________________

Name on certificate of title:______________________________

In possession of:______________________________

Vehicle identification number:______________________________

Does vehicle have loan against it? ____yes ____no

If yes, state:

Exact name of creditor:______________________________

Current balance: $_____as of______________________________

Current net equity in vehicle: $__________

Date acquired:______________________________

Source of down payment:______________________________

Who should be awarded the vehicle in the divorce?

____

4. Retirement Benefits

4.1 Defined Contribution Retirement 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):

a. Exact name of plan:______________________________

Name and address of plan administrator:______________________________

____

Employer:______________________________

Attorney/Client-Privileged Information

Employee:____

Starting date of creditable service:________________________________

Percentage employee is vested:__________________________________

Account name:____

Account number:____

Account balance as of date of marriage: $___________________________

Payee of survivor benefits:_____________________________________

Has beneficiary been designated? ____yes ____ no

If so, identify beneficiary:______________________________________

Current balance: $_____as of_____________________________________

Current community value: $______as of_____________________________

Current loan balance: $______as of__________________________________

4.2 **Defined Benefit Retirement Plan** (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula):

a. 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 balance: $____as of____

Current value of community interest in plan: $_____as of ___________________

4.3 IRA/SEP:

a. Name of financial institution:____

Account name:____

Account number:____

Payee of survivor benefits:____

Designated beneficiary:____

Current account balance: $_____as of___________________________________

Current community value: $_____as of___________________________________

4.4 Military Benefits:

a. Branch of service:____

Name of service member:____

Rank/pay grade of service member:_____________________________________

Starting date of creditable service:_____________________________________

Status of service member (active, reserve, or retired):_____________________

Payee of survivor benefits:____

Description of benefits:____

Monthly benefit payable: $____

Value of community interest in plan: $___as of______________________________

Percentage of plan that is community: ________ %

4.5 Nonqualified Plans:

a. Name of financial institution:____

Account name:____

Account number:____

Account balance as of date of marriage: $___________________________________

Payee of survivor benefits:____

Has beneficiary been designated?____ yes ____no

If so, identify beneficiary:____

Current value of community interest in plan: $_______________________________

as of____

4.6 Government Benefits (civil service, teacher, railroad, state and local):

a. Name of plan:____

Account name:____

Account number:____

Account balance as of date of marriage: $___________________________________

Has beneficiary been designated?____ yes _____ no

If so, identify beneficiary:____

Current value of community interest in plan: $_______________________________

as of____

5. Other Deferred Compensation Benefits

(Examples include workers' compensation, disability benefits, bonuses and other "special payments," employee stock options, and other forms of executive compensation.)

5.1 Husband:

a. Description of assets:____

____

Value: $____

5.2 Wife:

a. Description of assets:____

____

Value: $____

6. Insurance and Annuities

6.1 Life Insurance:

a. Name of insurance company:____________________________________

Policy number:____

Name of insured:____

Name of owner:____

Type of insurance (term/whole/universal):__________________________

Amt. of premiums: $___(monthly/quarterly/semi-annually)

Date of issue:____

Face amount:____

Cash surrender value on date of marriage: $_________________________

Current cash surrender value: $__________________________________

Designated beneficiary:____

Balance of loan against policy, if any: $____________________________________

6.2 Annuities:

a. Name of company:____

Policy number:____

Name of annuitant:____

Name of owner:____

Type of annuity:____

Amt. of premiums:$___(monthly/quarterly/semi-annually)

Date of issue:____

Face amount:____

Value on date of marriage: $____

Current value: $_______as of____

Designated beneficiary:____

Balance of loan against policy, if any: $____________________________________

7. Brokerage and Mutual Fund Accounts

7.1 Brokerage Accounts:

a. 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____

b. 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___

8. Publicly Traded Stocks, Bonds, and Other Securities

8.1 Stocks:

a. Name of security:____

Number of shares:____

Type of security (common stock, preferred stock, bond, or other description): ____

Certificate numbers:____

In possession of:____

Current market value: $_____ as of____

Name of exchange on which listed:____

Pledged as collateral? _______yes _______ no

If yes, explain terms, to whom pledged, and other details surrounding pledge of securities as collateral:____

____

8.2 Bonds:

a. Name of issuer:____

Address:____

Serial number of bond: ____

Denomination:____

Date acquired:____

Cost: $_____Value:$______as of_____________________________________

Registered owner:____

Source of funds:____

Interest rate:____Interest payable:_____________________________________

Convertible:______Due date:____

Pledged:_____To:____

Reason:____

9. Closely Held Business Interests

9.1 (Include sole proprietorships, professional practices, partnerships, joint ventures, and other nonpublicly traded corporate business entities, and so forth.)

a. Name of business:____

Address of business:____

Type of business organization:___________________________________

Percentage of ownership:____

Number of shares owned (if applicable):____________________________

Members in business:____

Annual income from business: $___________________________________

Type of business:____

Date business began:____

Source of funds in business:______________________________________

Value of interest: $______as of____________________________________

Is there a written organizational agreement? ___________________________

Comments: ____

10. Loans Receivable

10.1 (Include money owed to you or your spouse, including any expected federal or state income tax refund, but do not include receivables connected with a business.)

a. Name of debtor: ____

Debtor's relationship to you: _____________________________________

Purpose of loan: ____

Is debt evidenced in writing? _____ yes _____ no

Is debt secured? ________ yes ________ no

If so, detail security:____

Is debt reasonably expected to be paid? ___ yes __ no

Current loan balance: $______ as of_______________________________

Balance of any accounts receivable: $______________________________

b. Name of debtor: ____

Debtor's relationship to you:____________________________________

Purpose of loan: ____

Is debt evidenced in writing? _____ yes _____ no

Is debt secured? ________ yes ________ no

If so, detail security: ____

Is debt reasonably expected to be paid?___yes ___no

Current loan balance: $_____as of____

Balance of any accounts receivable: $ ____________________________________

c. Name of debtor: ____

Debtor's relationship to you:____

Purpose of loan: ____

Is debt evidenced in writing? _____ yes _____ no

Is debt secured? _______ yes _________ no

If so, detail security: ____

Is debt reasonably expected to be paid?___ yes ___ no

Current loan balance: $______as of____

Balance of any accounts receivable: $ ____________________________________

11. Household Furniture, Furnishings, and Fixtures

11.1 Household Furniture

a. State your opinion of the fair market value of the household furniture, furnishings, and fixtures. Fair market value is not necessarily the cost or the replacement value. If you expect a dispute about the division of this property, you may want to attach an itemized list of major items by room. If you or your spouse will contend that any of the property was owned before your marriage or acquired during the marriage by gift or inheritance, please so indicate.

Fair market value: $____

12. Electronics and Computers

12.1 In Possession of Husband:

Description	Source	Value

12.2 In Possession of Wife:

Description	Source	Value

13. Antiques, Artwork, and Collections

Description	Source	Value

13.1 In Possession of Husband:

Description	Source	Value

13.2 In Possession of Wife:

Description	Source	Value

14. Miscellaneous Sporting Goods and Firearms

14.1 In Possession of Husband:

Description	Source	Value

14.2 In Possession of Wife:

Description	Source	Value

15. Jewelry and Other Personal Items
(List major items and state value.)

15.1 In Possession of Husband:

Description	Source	Value

15.2 In Possession of Wife:

Description	Source	Value

Attorney/Client-Privileged Information

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

16.1 In Possession of Husband:

Description	Source	Value
______________________	______________________	______________________
______________________	______________________	______________________

16.2 In Possession of Wife:

Description	Source	Value
______________________	______________________	______________________
______________________	______________________	______________________

17. Club Memberships

17.1 Club Information

a. Name of club:____

Name membership held in:______________________________________

Account number: ____

Current value: $________ as of ________________________________

Method of valuation: ____

18. Travel Award Benefits

18.1 Airline Information

a. Name of airline: ____

Account number:____

Current number of miles: _____ as of __________________________

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 document, tax overpayments, loss carry–forward deductions.)

19.1 In Possession of Husband:

Description	Source	Value
______________	______________	______________
______________	______________	______________

19.2 In Possession of Wife:

Description	Source	Value
______________	______________	______________
______________	______________	______________

20. Community Claim for Reimbursement
(Against Husband's or Wife's separate estate.)

20.1 Reimbursement Claim against Husband's Separate Estate:

a. Description of basis of claim: ______________________________

Amount claimed: $______________________________

20.2 Reimbursement Claim against Wife's Separate Estate:

a. Description of basis of claim: ______________________________

Amount claimed: $______________________________

Attorney/Client-Privileged Information

21. Contingent Assets

21.1 (For example, lawsuits by either party against a third party.)

a. Nature of claim: ______________________________

Amount of claim: ______________________________

Legal representative: ______________________________

Address:______________________________

Cause number: ______________________________

Court where case is pending: ______________________________

Name of opposing attorney: ______________________________

Address: ______________________________

22. Community Liabilities

22.1 Credit Cards and Charge Accounts:

a. Name of creditor:______________________________

Account number:______________________________

Name(s) on account: ______________________________

Current balance: $ _____ as of ______________________________

Balance as of date of separation: $______________________________

Who charged what on this account? ______________________________

Who will be responsible after divorce? ______________________________

b. Name of creditor:______________________________

Account number:______________________________

Name(s) on account: ______________________________

Current balance: $ ______ as of ____

Balance as of date of separation: $____

Who charged what on this account? ____

Who will be responsible after divorce? ______________________________________

c. Name of creditor:____

Account number:____

Name(s) on account: ____

Current balance: $ ______ as of ____

Balance as of date of separation: $____

Who charged what on this account? ____

Who will be responsible after divorce? ______________________________________

d. Name of creditor:____

Account number:____

Name(s) on account: ____

Current balance: $ ______ as of ____

Balance as of date of separation: $____

Who charged what on this account? ____

Who will be responsible after divorce? ______________________________________

22.2 Federal, State, and Local Tax Liability:

a. Amount owed in any previous tax year (describe liability, such as federal income tax, property taxes): $____

Amount owed for current year: $____

Attorney/Client-Privileged Information

22.3 Attorney's Fees in This Case:

a. Husband: $_______ as of ____

b. Wife: $___________ as of____

22.4 Other Professional Fees in This Case:

a. Husband: $________ as of ____

b. Wife: $____________ as of ____

22.5 Other Liabilities Not Otherwise Listed Elsewhere in This Document:

a. Name of creditor:____

Name on account: ____

Account number: ____

Is loan evidenced in writing? ____

Margin account balances: ____

Party incurring liability: ____

Party actually signing: ____

Current balance: $ _______ as of ____

Security, if any: ____

22.6 Reimbursement Claims against Community Estate:

a. Reimbursement claim by husband's separate estate against community estate:

Description of basis of claim:____

Amount claimed: $ ____

b. Reimbursement claim by wife's separate estate against community estate:

Description of basis of claim:____

Amount claimed: $ ______________________________

22.7 Contingent Liabilities (for example, lawsuit against either party, guaranty either party may have signed):

a. Name of creditor: ______________________________

Name of person primarily liable: ______________________________

Amount of contingent liability: $ ______________________________

Nature of contingency: ______________________________

23. Separate Assets of Husband

23.1 Assets:

a. Description of asset: ______________________________

Date property acquired: ______________________________

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

____

Value: $ ______________ as of ______________________________

23.2 Husband's Separate Reimbursement Claim against Community Estate:

a. Description of basis of claim: ______________________________

Amount claimed: $ ______________________________

23.3 Husband's Separate Reimbursement Claim against Wife's Separate Estate:

a. Description of basis of claim: ______________________________

Amount claimed: $ ______________________________

Attorney/Client-Privileged Information

24. Liabilities of Husband's Separate Estate

24.1 Liabilities:

a. Description of liability: ____________________

Date of liability: ____________________

How liability acquired: ____________________

Amount of liability: $ ______ as of____________________

24.2 Community Reimbursement Claim against Husband's Separate Estate:

a. Description of basis of claim: ____________________

Amount claimed: $ ____________________

24.3 Wife's Separate Reimbursement Claim against Husband's Separate Estate:

a. Description of basis of claim:____________________

Amount claimed: $ ____________________

25. Separate Assets of Wife

25.1 Assets:

a. Description of asset: ____________________

Date property acquired: ____________________

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

Value: $__________ as of ____________________

25.2 Wife's Separate Reimbursement Claim against Community Estate:

a. Description of basis of claim:____________________

Amount claimed: $ ____________________

25.3 Wife's Separate Reimbursement Claim against Husband's Separate Estate:

a. Description of basis of claim:____

Amount claimed: $ ____

26. Liabilities of Wife's Separate Estate

26.1 Liabilities:

a. Description of liability:____

Date of liability: ____

How liability acquired: ____

Amount of liability: $______ as of ____

26.2 Community Reimbursement Claim against Wife's Separate Estate:

a. Description of basis of claim:____

Amount claimed: $ ____

26.3 Husband's Separate Reimbursement Claim against Wife's Separate Estate:

a. Description of basis of claim:____

Amount claimed: $ ____

27. Children's Property

27.1 Custodial Account under the Texas Uniform Transfers to Minors Act:

a. Name of financial institution:____

Name of account: ____

Account number: ____

Amount on deposit: $_____ as of ____

Name of minor for whom funds were deposited:___________________________

Name of custodian: ____

27.2 Other Property: ____

28. Assets Held by Either Party for the Benefit of Another

28.1 Description of Assets

a. Name(s) of person(s) holding assets: ___________________________________

Description of assets: ____

Name and title of fiduciary (for example, executor or trustee):________________

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 Description of Assets

a. Name(s) of person(s) holding assets: ___________________________________

Description of assets: ____

Name and title of fiduciary (for example, executor or trustee): ________________

Name of owner of beneficial interest: ___________________________________

Value of assets: $ _____ as of ____

HOUSEHOLD FURNITURE AND FURNISHINGS

Make a list of all household furniture and furnishings giving each item a garage sale value, stating in whose possession they are in, and how they were acquired (gift, inheritance, separate property or bought during the marriage. Be sure to include any items outside, in the attic, and in the garage.

ITEM	VALUE	H	W	NOTES
