

IN THE MATTER OF  
THE MARRIAGE OF

NO.

IN THE DISTRICT COURT

\_\_\_\_\_  
AND  
\_\_\_\_\_

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

AND IN THE INTEREST OF  
\_\_\_\_\_, CHILDREN

TARRANT COUNTY, TEXAS

**INVENTORY AND APPRAISEMENT OF**

**\*\*\*Due back in this office 30 days after divorce filing. Please attach all source documents\*\*\***

\_\_\_\_\_, \*Petitioner/Respondent\*, files 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 \_\_\_\_\_

Exact name of mortgage company and account number, if any: \_\_\_\_\_  
Account No. \_\_\_\_\_

Current balance of first mortgage: \_\_\_\_\_  
as of \_\_\_\_\_

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 \_\_\_\_\_

Exact name of mortgage company and account number, if any: \_\_\_\_\_  
Account No. \_\_\_\_\_

Current balance of first mortgage: \_\_\_\_\_  
as of \_\_\_\_\_

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 \_\_\_\_\_

Exact name of mortgage

company and account  
 number, if any: \_\_\_\_\_  
 Account No. \_\_\_\_\_  
 Current balance of  
 first mortgage: \_\_\_\_\_  
 as of \_\_\_\_\_  
 Current net equity  
 in property: \_\_\_\_\_

2.. CASH AND ACCOUNTS WITH FINANCIAL INSTITUTIONS

2.1. Exact name of  
 financial institution: \_\_\_\_\_  
 Account number: \_\_\_\_\_  
 Exact name on account: \_\_\_\_\_  
 Type of account: \_\_\_\_\_  
 Exact name on  
 withdrawal cards: \_\_\_\_\_  
 Current account balance: \_\_\_\_\_  
 as of \_\_\_\_\_

2.2. Exact name of  
 financial institution: \_\_\_\_\_  
 Account number: \_\_\_\_\_  
 Exact name on account: \_\_\_\_\_  
 Type of account: \_\_\_\_\_  
 Exact name on  
 withdrawal cards: \_\_\_\_\_  
 Current account balance: \_\_\_\_\_  
 as of \_\_\_\_\_

2.3. Exact name of  
 financial institution: \_\_\_\_\_  
 Account number: \_\_\_\_\_

Exact name on account: \_\_\_\_\_

Type of account: \_\_\_\_\_

Exact name on withdrawal cards: \_\_\_\_\_

Current account balance: \_\_\_\_\_

as of \_\_\_\_\_

2.4. Exact name of financial institution: \_\_\_\_\_

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

Exact name on account: \_\_\_\_\_

Type of account: \_\_\_\_\_

Exact name on withdrawal cards: \_\_\_\_\_

Current account balance: \_\_\_\_\_

as of \_\_\_\_\_

2.5. Exact name of financial institution: \_\_\_\_\_

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

Exact name on account: \_\_\_\_\_

Type of account: \_\_\_\_\_

Exact name on withdrawal cards: \_\_\_\_\_

Current account balance: \_\_\_\_\_

as of \_\_\_\_\_

2.6. Exact name of financial institution: \_\_\_\_\_

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

Exact name on account: \_\_\_\_\_

Type of account: \_\_\_\_\_

Exact name on  
withdrawal cards: \_\_\_\_\_

Current account balance: \_\_\_\_\_

as of \_\_\_\_\_

### ACCOUNTS RECEIVABLE

3.1. Name of debtor: \_\_\_\_\_

Debtor's  
Relationship to you: \_\_\_\_\_

Purpose of loan: \_\_\_\_\_

Is debt evidenced  
in writing? \_\_\_\_\_

Is debt secured? \_\_\_\_\_

If so, detail security: \_\_\_\_\_

Is debt reasonably  
expected to be paid? \_\_\_\_\_

Current loan balance: \_\_\_\_\_  
as of \_\_\_\_\_

3.2. Name of debtor: \_\_\_\_\_

Debtor's  
Relationship to you: \_\_\_\_\_

Purpose of loan: \_\_\_\_\_

Is debt evidenced  
in writing? \_\_\_\_\_

Is debt secured? \_\_\_\_\_

If so, detail security: \_\_\_\_\_

Is debt reasonably expected to be paid? \_\_\_\_\_

Current loan balance: \_\_\_\_\_  
as of \_\_\_\_\_

**RETIREMENT ACCOUNTS**

4.1. Exact name of financial institution: \_\_\_\_\_

Exact account name: \_\_\_\_\_

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

Account balance as of date of marriage: \_\_\_\_\_

Payee of survivor benefits: \_\_\_\_\_

Has a beneficiary been designated: \_\_\_\_\_

If so, identify beneficiary: \_\_\_\_\_

Current community account balance: \_\_\_\_\_  
as of \_\_\_\_\_

**COMPANY RETIREMENT BENEFITS**

5.1. 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 \_\_\_\_\_

Method of computation  
of amount in plan:

\_\_\_\_\_

Is there a loan or offset  
against the plan?

\_\_\_\_\_

Current balance:

\_\_\_\_\_ as of \_\_\_\_\_

### MILITARY AND GOVERNMENT RETIREMENT BENEFITS

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

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

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

Starting date of  
creditable service: \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Payee of survivor  
benefits: \_\_\_\_\_

Description of all  
benefits: \_\_\_\_\_

Value of community  
interest in plan: \_\_\_\_\_ per month \_\_\_\_\_

as of \_\_\_\_\_

OTHER DEFERRED COMPENSATION BENEFITS

7.1. Husband  
Description of assets: \_\_\_\_\_

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

7.2. Wife  
Description of assets: \_\_\_\_\_

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

LIFE INSURANCE AND ANNUITIES

8.1. Exact insurance  
company name: \_\_\_\_\_

Policy number: \_\_\_\_\_

Name of insured: \_\_\_\_\_

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

Type of insurance: \_\_\_\_\_

Amount of premiums  
and date due: \_\_\_\_\_

Date of issue: \_\_\_\_\_

Face amount: \_\_\_\_\_

Cash surrender value  
on date of marriage: \$ \_\_\_\_\_

Current cash  
surrender value: \$ \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Is there a loan against



this policy? \_\_\_\_\_

If yes, explain: \_\_\_\_\_

8.2. Exact insurance company name: \_\_\_\_\_

Policy number: \_\_\_\_\_

Name of insured: \_\_\_\_\_

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

Type of insurance: \_\_\_\_\_

Amount of premiums and date due: \_\_\_\_\_

Date of issue: \_\_\_\_\_

Face amount: \_\_\_\_\_

Cash surrender value on date of marriage: \_\_\_\_\_

Current cash surrender value: \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Is there a loan against this policy? \_\_\_\_\_

If yes, explain: \_\_\_\_\_

8.3. Exact insurance company name: \_\_\_\_\_

Policy number: \_\_\_\_\_

Name of insured: \_\_\_\_\_

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

Type of insurance: \_\_\_\_\_

Amount of premiums and date due: \_\_\_\_\_

Date of issue: \_\_\_\_\_

Face amount: \_\_\_\_\_

Cash surrender value on date of marriage: \_\_\_\_\_

Current cash surrender

value: \_\_\_\_\_  
Beneficiary: \_\_\_\_\_  
Is there a loan against  
this policy? \_\_\_\_\_  
If yes, explain: \_\_\_\_\_

8.4. Exact insurance company  
name: \_\_\_\_\_

Policy number: \_\_\_\_\_  
Name of insured: \_\_\_\_\_  
Name of owner: \_\_\_\_\_  
Type of insurance: \_\_\_\_\_  
Amount of premiums and  
date due: \_\_\_\_\_

Date of issue: \_\_\_\_\_  
Face amount: \_\_\_\_\_  
Cash surrender value on  
date of marriage: \_\_\_\_\_  
Current cash surrender  
value: \_\_\_\_\_  
Beneficiary: \_\_\_\_\_  
Is there a loan against  
this policy? \_\_\_\_\_  
If yes, explain: \_\_\_\_\_

9.. PUBLICLY TRADED STOCKS, BONDS, AND OTHER SECURITIES

9.1. Security name: \_\_\_\_\_  
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? \_\_\_\_\_  
If yes, explain terms,  
to whom pledged, and  
other details

surrounding pledge of securities as collateral:

\_\_\_\_\_

9.2. Security name: \_\_\_\_\_  
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? \_\_\_\_\_  
If yes, explain terms, to whom pledged, and other details surrounding pledge of securities as collateral: \_\_\_\_\_

9.3. Security name: \_\_\_\_\_  
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? \_\_\_\_\_  
If yes, explain terms, to whom pledged, and other details surrounding pledge of securities as collateral: \_\_\_\_\_

10.. CLOSELY HELD BUSINESS INTERESTS

10.1. Exact name of business: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Date business began: \_\_\_\_\_  
Type of business  
organization: \_\_\_\_\_  
Percentage of ownership: \_\_\_\_\_  
Estimated value: \$ \_\_\_\_\_  
\_\_\_\_\_ as of \_\_\_\_\_

10.2. Exact name of business: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Date business began: \_\_\_\_\_  
Type of business  
organization: \_\_\_\_\_  
Percentage of ownership: \_\_\_\_\_  
Estimated value: \$ \_\_\_\_\_  
\_\_\_\_\_ as of \_\_\_\_\_

10.3. Exact name of business: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Date business began: \_\_\_\_\_  
Type of business  
organization: \_\_\_\_\_  
Percentage of ownership: \_\_\_\_\_  
Estimated value: \$ \_\_\_\_\_  
\_\_\_\_\_ as of \_\_\_\_\_

11. MOTOR VEHICLES, BOATS, AIRPLANES, CYCLES, ETC.

11.1. Year: \_\_\_\_\_  
Model: \_\_\_\_\_  
Name on certificate of  
title: \_\_\_\_\_  
In possession of: \_\_\_\_\_  
Vehicle identification  
number: \_\_\_\_\_  
Does vehicle have loan  
against it? \_\_\_\_\_  
If yes, state: \_\_\_\_\_  
Current balance: \$ \_\_\_\_\_  
\_\_\_\_\_ as of \_\_\_\_\_  
Current net equity in  
vehicle: \$ \_\_\_\_\_

11.2. Year: \_\_\_\_\_  
Model: \_\_\_\_\_

Name on certificate of title: \_\_\_\_\_  
 In possession of: \_\_\_\_\_  
 Vehicle identification number: \_\_\_\_\_  
 Does vehicle have loan against it? \_\_\_\_\_  
 If yes, state: \_\_\_\_\_  
 Current balance: \$ \_\_\_\_\_  
 \_\_\_\_\_ as of \_\_\_\_\_  
 Current net equity in vehicle: \$ \_\_\_\_\_

12.. HOUSEHOLD FURNITURE, FURNISHINGS, AND FIXTURES

12.1. In possession of husband:

Total Value: \_\_\_\_\_

12.2. In possession of wife:

Total Value: \_\_\_\_\_

13.. MISCELLANEOUS SPORTING GOODS AND FIREARMS

13.1. In possession of husband:

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

13.2. In possession of wife: N/A

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

14.. ANTIQUES, ARTWORK, AND COLLECTIONS

14.1. In possession of husband:

Description: \$ \_\_\_\_\_

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

14.2. In possession of wife:

Description:

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

15.. ELECTRONICS AND COMPUTERS

15.1. In possession of husband:

Description:

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

15.2. In possession of wife:

Description:

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

16.. CLOTHING, JEWELRY, AND PERSONAL ITEMS

16.1. Husband:

Description:

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

16.2. Wife:

Description:

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

17.. LIVESTOCK

17.1. In possession of  
husband:

Description:

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

17.2. In possession of wife:

Description:

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

18.. CLUB MEMBERSHIPS

18.1. Exact name of club: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Method of valuation: \_\_\_\_\_

18.2. Exact name of club: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Method of valuation: \_\_\_\_\_

18.3. Exact name of club: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Method of valuation: \_\_\_\_\_

19.. FREQUENT FLYER MILEAGE ACCOUNTS

19.1. Exact name of airline: \_\_\_\_\_  
Current number of miles: \_\_\_\_\_  
Value (if any): \_\_\_\_\_

19.2. Exact name of airline: \_\_\_\_\_  
Current number of miles: \_\_\_\_\_  
Value (if any): \_\_\_\_\_

20.. MISCELLANEOUS ASSETS

20.1. In possession of husband:

Description:

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

20.2. In possession of wife:

Description:

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

21.. COMMUNITY CLAIM FOR REIMBURSEMENT AGAINST HUSBAND'S OR WIFE'S SEPARATE ESTATE

21.1. Reimbursement claim against husband's separate estate: \$ \_\_\_\_\_  
Description: \_\_\_\_\_  
Amount claimed: \$ \_\_\_\_\_

21.2. Reimbursement claim against wife's separate estate: \$ \_\_\_\_\_  
Description: \_\_\_\_\_  
Amount claimed: \$ \_\_\_\_\_

22.. CONTINGENT ASSETS AND CLAIMS

22.1. Nature of claim: \_\_\_\_\_  
Amount of claim: \$ \_\_\_\_\_  
Legal representative: \_\_\_\_\_  
Address: \_\_\_\_\_



Cause number: \_\_\_\_\_  
Court where case is  
pending: \_\_\_\_\_  
Name of opposing  
attorney: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

23.. COMMUNITY LIABILITIES

ATTORNEY'S FEES IN THIS CASE

23.1. Husband: \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.2. Wife: \$ \_\_\_\_\_  
as of \_\_\_\_\_

OTHER PROFESSIONAL FEES IN THIS CASE

23.3. Husband: \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.4. Wife: \$ \_\_\_\_\_  
as of \_\_\_\_\_

CREDIT CARDS AND CHARGE ACCOUNTS

23.5. Exact name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Exact name on account: \_\_\_\_\_  
Current balance \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.6. Exact name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Exact name on account: \_\_\_\_\_  
Current balance \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.7.

Exact name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Exact name on account: \_\_\_\_\_  
Current balance \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.8. Exact name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Exact name on account: \_\_\_\_\_  
Current balance \$ \_\_\_\_\_  
as of \_\_\_\_\_

23.9. Exact name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Exact name on account: \_\_\_\_\_  
Current balance \$ \_\_\_\_\_  
as of \_\_\_\_\_

FEDERAL, STATE, AND LOCAL TAX LIABILITY

23.10. Amount owed in any  
previous tax year: \$ \_\_\_\_\_  
  
Amount you owe for  
current year: \$ \_\_\_\_\_  
as of \_\_\_\_\_

SEPARATE ESTATES OF THE PARTIES

24.. SEPARATE ESTATE OF HUSBAND

24.1. Description of asset: \_\_\_\_\_  
Date property acquired: \_\_\_\_\_  
How acquired: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

24.2. Description of  
liability: \_\_\_\_\_  
Date of liability: \_\_\_\_\_  
  
How liability acquired: \_\_\_\_\_  
Amount of liability: \$ \_\_\_\_\_

24.3. Husband's reimbursement claim against community estate: \_\_\_\_\_

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

24.4. Husband's reimbursement claim against wife's separate estate: \_\_\_\_\_

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

24.5. Community reimbursement claim against husband's separate estate: \_\_\_\_\_

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

24.6. Wife's reimbursement claim against husband's separate estate: \_\_\_\_\_

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

25.. SEPARATE ESTATE OF WIFE

25.1. Description of asset: \_\_\_\_\_  
Date property acquired: \_\_\_\_\_  
How acquired: \_\_\_\_\_  
Value: \$ \_\_\_\_\_

25.2. Description of liability: \_\_\_\_\_  
Date of liability: \_\_\_\_\_  
How liability acquired: \_\_\_\_\_  
Amount of liability: \$ \_\_\_\_\_

25.3. Wife's reimbursement claim against community estate: \_\_\_\_\_

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

25.4. Wife's reimbursement claim against wife's separate estate: \_\_\_\_\_

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

25.5. Community reimbursement claim against wife's separate estate: \_\_\_\_\_

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

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

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

**VERIFICATION**

I, \_\_\_\_\_, state on oath that, to the best of my knowledge and belief, the foregoing inventory and appraisalment contains--

26. a full and complete list of all properties in my possession or subject to my control that I claim belong to the community estate of me and my spouse, with the values thereof;

27. a full and complete list of all properties in my possession or subject to my control that I claim or admit as my or my spouse's separate property and estate, with the values thereof; and

28. a full and complete list of the debts that I claim are community indebtedness.

I make this affidavit with the following reservations and qualifications:

29. Any omission from this inventory is not intentional but is done through mere inadvertence and not to mislead my spouse.

30. there may be other assets and liabilities of which my spouse is aware, and their omission from this inventory should not be construed as a waiver of my interest in those items.

SIGNED this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

\_\_\_\_\_

**STATE OF TEXAS           §**  
  **§**  
**COUNTY OF TARRANT   §**

SIGNED under oath before me this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_.

\_\_\_\_\_  
Notary Public, State of Texas

