

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. If more pages are required for any category of asset, please attach additional pages.

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1. Real Estate

1.1 Home Owned:

Street address: _____

County of location: _____

General description: _____

Legal description: _____

Current fair market value: \$ _____ as of _____

Sources of value (i.e., local appraisal district, independent appraisal) _____

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

Current balance of mortgages: \$ _____

a. First mortgage

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Name of lienholder and account number: _____

Current balance of lien: \$ _____ as of _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

b. Second lien

Name of second lienholder and account number: _____

Current balance of second lien: \$ _____ as of _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

Current net equity in property: \$ _____

Date property was acquired: _____

Amount of purchase price: \$ _____

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 Other Real Estate:

General description: _____

Location: _____

Description of improvements, if any: _____

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Source(s) of value (i.e., local appraisal district, independent appraisal) _____

Legal description: _____

Other owners: _____

Date acquired: _____ Total cost: \$ _____

Amount of purchase price: \$ _____

Record title owner: _____

Down payment and source of down payment: \$ _____

First lienholder: _____

Address: _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

Balance due: \$ _____ as of _____

Second lienholder: _____

Address: _____

Monthly payment: \$ _____ Due date: _____ Interest rate: _____

Balance due: \$ _____ as of _____

1.3 Transfer on Death Deeds

If you have signed a transfer on death deed in favor of your spouse, please specifically identify the real property above that is affected by the deed.

2. Mineral Interests

a. Name of mineral interest/lease/well: _____

Type of interest: _____

County of location: _____

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Legal description: _____

Name of producer or operator: _____

Current value: \$ _____

Source(s) of value: _____

b. Name of mineral interest/lease/well: _____

Type of interest: _____

County of location: _____

Legal description: _____

Name of producer or operator: _____

Current value: \$ _____

Source(s) of value: _____

3. Cash and Accounts with Financial Institutions

(Include cash, traveler’s checks, money orders, and accounts with commercial banks, savings and loan associations, and credit unions; exclude accounts with brokerage houses and all retirement accounts.)

3.1 Checking 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 _____

Source(s) of value/balance: _____

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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 _____

Source(s) of value/balance: _____

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 _____

Source(s) of value/balance: _____

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When account opened: _____

Source of funds: _____

Use of account: _____

3.2 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 _____

Source(s) of value/balance: _____

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: _____

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Name(s) on withdrawal cards: _____

Current balance: \$ _____ as of _____

Source(s) of value/balance: _____

When account opened: _____

Source of funds: _____

Use of account: _____

Pledged: _____ To: _____

Reason: _____

3.3 Certificates of Deposit:

a. Name of financial institution: _____

Address: _____

Account officer: _____

Phone: _____

C.D. in the name of: _____

Amount of C.D.: \$ _____ Interest rate: _____

Source(s) of value/balance: _____

When purchased: _____ When due: _____

Where is C.D. now? _____

Source of funds: _____

Pledged: _____ To: _____

Reason: _____

b. Name of financial institution: _____

Address: _____

Account officer: _____

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Phone: _____

C.D. in the name of: _____

Amount of C.D.: \$ _____ Interest rate: _____

Source(s) of value/balance: _____

When purchased: _____ When due: _____

Where is C.D. now? _____

Source of funds: _____

Pledged: _____ To: _____

Reason: _____

4. Brokerage and Mutual Fund Accounts

a. Name of brokerage firm or mutual fund: _____

Address of brokerage firm or mutual fund: _____

Name account held in: _____

Name of account (and subaccounts, if any): _____

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

Margin loan balance: \$ _____ as of _____

Value of community interest in each account (and subaccounts, if any):

\$ _____ as of _____

Source(s) of value/balance: _____

Tax basis of each security held: \$ _____

b. Name of brokerage firm or mutual fund: _____

Address of brokerage firm or mutual fund: _____

Name account held in: _____

Name of account (and subaccounts, if any): _____

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

Margin loan balance: \$ _____ as of _____

Value of community interest in each account (and subaccounts, if any):
\$ _____ as of _____

Source(s) of value/balance: _____

Tax basis of each security held: \$ _____

5. Publicly Traded Stocks, Bonds, and Other Securities

(Include securities not in a brokerage account, mutual fund, or retirement fund.)

5.1 Stocks:

a. Name of security: _____

Number of shares: _____

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

Certificate numbers: _____

In possession of: _____

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: _____

Date acquired: _____

Tax basis: \$ _____

Current market value: \$ _____ as of _____

Source(s) of value: _____

Value of community interest: \$ _____ as of _____

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5.2 Bonds:

- a. Name of issuer: _____
- Address: _____
- Serial number of bond: _____ Denomination: _____
- Date acquired: _____
- Cost: \$ _____ Value: \$ _____ as of _____
- Source(s) of value: _____
- Value of community interest: \$ _____ as of _____
- Registered owner: _____
- Source of funds: _____
- Interest rate: _____ Interest payable: _____
- Convertible: _____ Due date: _____
- Pledged: _____ To: _____
- Reason: _____

6. Stock Options

(Include all exercisable, vested, and nonvested stock options regardless of any restrictions on transfer.)

- a. Name of company: _____
- Date of option or grant: _____
- Vesting schedule: _____
- Number of options: _____
- Are the options exercisable? _____ Are the options registered? _____
- Current stock price: \$ _____ as of _____
- Strike price: \$ _____
- Current net market value: \$ _____ as of _____

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Source(s) of value: _____

Value of community interest: \$ _____ as of _____

If purchased, total purchase price of option contract (including commissions):
\$ _____

b. Name of company: _____

Date of option or grant: _____

Vesting schedule: _____

Number of options: _____

Are the options exercisable? _____ Are the options registered? _____

Current stock price: \$ _____ as of _____

Strike price: \$ _____

Current net market value: \$ _____ as of _____

Source(s) of value: _____

Value of community interest: \$ _____ as of _____

If purchased, total purchase price of option contract (including commissions):
\$ _____

7. Bonuses

a. Name of company: _____

Spouse earning bonus: _____

Date bonus expected to be paid: _____

Time period covered by bonus: _____

Anticipated amount of bonus: \$ _____

Source(s) of value: _____

b. Name of company: _____

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Spouse earning bonus: _____

Date bonus expected to be paid: _____

Time period covered by bonus: _____

Anticipated amount of bonus: \$ _____

Source(s) of value: _____

8. Closely Held Business Interests

(Include sole proprietorships, professional practices, corporations, partnerships, limited liability companies and partnerships, joint ventures, and other nonpublicly traded business entities.)

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 _____

Source(s) of value: _____

Is there a written organizational agreement? _____

Comments: _____

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9. Retirement Benefits

9.1 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: _____
- Employee: _____
- Employer: _____
- Starting date of creditable service: _____
- 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 _____
- Source(s) of value/balance: _____
- Value of community interest in plan: \$ _____ as of _____
- Current loan balance: \$ _____ as of _____

9.2 Defined Benefit Retirement Plans (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: _____

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Designated beneficiary: _____

Payee of survivor benefits: _____

Description of benefits: _____

Current balance: \$ _____ as of _____

Source(s) of value/balance: _____

Value of community interest in plan: \$ _____ as of _____

9.3 IRA/SEP:

a. Name of financial institution: _____

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance: \$ _____ as of _____

Source(s) of value/balance: _____

Value of community interest in plan: \$ _____ as of _____

b. Name of financial institution: _____

Account name: _____

Account number: _____

Payee of survivor benefits: _____

Designated beneficiary: _____

Current account balance: \$ _____ as of _____

Source(s) of value/balance: _____

Value of community interest in plan: \$ _____ as of _____

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9.4 Military Benefits:

- a. Branch of service: _____
- Name of servicemember: _____
- Rank/pay grade of servicemember: _____
- Starting date of creditable service: _____
- Status of servicemember (active, reserve, or retired): _____
- Payee of survivor benefits: _____
- Description of benefits: _____
- Monthly benefit payable: \$ _____
- Source(s) of value: _____
- Value of community interest in plan: \$ _____ as of _____
- Percentage of plan that is community: _____%

9.5 Nonqualified Plans (Not under ERISA):

- 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: _____
- Value of community interest in plan: \$ _____ as of _____
- Source(s) of value: _____

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

- a. Name of plan: _____

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Account name: _____

Account number: _____

Account balance as of date of marriage: \$ _____

Has beneficiary been designated? ___ yes ___ no

If so, identify beneficiary: _____

Value of community interest in plan: \$ _____ as of _____

Source(s) of value: _____

10. Other Deferred Compensation Benefits

(Examples include workers' compensation, disability benefits, other "special payments," and other forms of compensation.)

10.1 Yours:

a. Description of assets: _____

Value: \$ _____

Source(s) of value: _____

10.2 Your Spouse's:

a. Description of assets: _____

Value: \$ _____

Source(s) of value: _____

11. Insurance and Annuities

11.1 Life Insurance:

a. Name of insurance company: _____

Policy number: _____

Name of insured: _____

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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: \$ _____

Source(s) of value: _____

Designated beneficiary: _____

Balance of loan against policy, if any: \$ _____

Value of community interest: \$ _____ as of _____

b. 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: \$ _____

Source(s) of value: _____

Designated beneficiary: _____

Balance of loan against policy, if any: \$ _____

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Value of community interest: \$ _____ as of _____

11.2 Annuities:

- a. 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: \$ _____
- Designated beneficiary: _____
- Value on date of marriage: \$ _____
- Current value: \$ _____ as of _____
- Source(s) of value: _____
- Balance of loan against policy, if any: \$ _____
- Value of community interest: \$ _____ as of _____

11.3 Health Savings Accounts:

- a. Institution holding account: _____
- Account number: _____
- Value of assets in account: \$ _____ as of _____
- Source(s) of value/balance: _____
- Name of high-deductible health plan with which the HSA is coupled: _____
- _____

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11.4 Medical Savings Accounts:

- a. Institution holding account: _____
Account number: _____
Value of assets in account: \$ _____ as of _____
Source(s) of value/balance: _____
Name of high-deductible health plan with which the MSA is coupled: _____

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

(Include mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles.)

12.1 Vehicles Owned:

- a. Year: _____ Make: _____ Model: _____
Name on title: _____
In possession of: _____
Vehicle identification number: _____
Current fair market value: \$ _____
Source(s) of value: _____
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 drives the vehicle? _____
- b. Year: _____ Make: _____ Model: _____

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Name on title: _____

In possession of: _____

Vehicle identification number: _____

Current fair market value: \$ _____

Source(s) of value: _____

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 drives the vehicle? _____

c. Year: _____ Make: _____ Model: _____

Name on title: _____

In possession of: _____

Vehicle identification number: _____

Current fair market value: \$ _____

Source(s) of value: _____

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: _____

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Who drives the vehicle? _____

13. Loans Receivable

(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: \$ _____

Source(s) of value/balance: _____

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: \$ _____

Source(s) of value/balance: _____

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14. Household Furniture, Furnishings, and Fixtures

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: \$ _____

Source(s) of value: _____

15. Electronics and Computers

15.1 In Your Possession:

Description	Source	Value

Source(s) of value: _____

15.2 In Your Spouse's Possession:

Description	Source	Value

Source(s) of value: _____

16. Antiques, Artwork, and Collections

16.1 In Your Possession:

Description	Source	Value

Source(s) of value: _____

16.2 In Your Spouse's Possession:

Description	Source	Value

Source(s) of value: _____

17. Miscellaneous Sporting Goods and Firearms

17.1 In Your Possession:

Description	Source	Value

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Source(s) of value: _____

17.2 In Your Spouse's Possession:

Description	Source	Value
_____	_____	_____
_____	_____	_____

Source(s) of value: _____

18. Jewelry and Other Personal Items

(List major items and state value.)

18.1 In Your Possession:

Description	Source	Value
_____	_____	_____
_____	_____	_____

Source(s) of value: _____

18.2 In Your Spouse's Possession:

Description	Source	Value
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Source(s) of value: _____

19. Livestock

(Include cattle, horses, and so forth.)

19.1 In Your Possession:

Description	Source	Value

Source(s) of value: _____

19.2 In Your Spouse's Possession:

Description	Source	Value

Source(s) of value: _____

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20. Club Memberships

- a. Name of club: _____
Name membership held in: _____
Account number: _____
Current value: \$ _____ as of _____
Method of valuation: _____
Source(s) of value: _____

21. Travel Award Benefits

- a. Name of airline: _____
Account number: _____
Name on account: _____
Current number of miles: _____ as of _____
Value (if any): \$ _____
Source(s) of value: _____

22. Other Assets

22.1 Miscellaneous Assets

(Intellectual property (such as musical, literary, and artistic/creative works; discoveries and inventions; copyright, trademarks, patents, and so forth), licenses, crops, farm equipment, construction equipment, tools, leases, cemetery lots, gold or silver coins not part of a collection described elsewhere in this document, estimated tax payments, tax overpayments, loss carry-forward deductions, lottery tickets/winnings, stadium bonds, stadium seat licenses, seat options, season tickets, ranch brands, and business names.)

22.1.A. In Your Possession:

Description	Source	Value
-------------	--------	-------

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Source(s) of value: _____

22.1.B. In Your Spouse's Possession:

Description	Source	Value

Source(s) of value: _____

22.2 Digital Assets

(Anything that exists in digital form, that is, data in the form of binary digits, including such items as e-mail addresses, social network accounts, Web sites, domain names, digital media such as pictures, music, e-books, movies, and videos, blogs, reward points, digital storefronts, artwork, and data storage accounts.)

22.2.A. In Your Possession:

Description	Source	Value

Source(s) of value: _____

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22.2.B. In Your Spouse’s Possession:

Description	Source	Value
_____	_____	_____
_____	_____	_____

Source(s) of value: _____

22.3 Virtual Assets

(Intangibles used in virtual worlds or MMORPGs (massively multiplayer online role playing games), virtual pets, avatars, accessories for characters, prizes, virtual real estate, or virtual currency.)

22.3.A. In Your Possession:

Description	Source	Value
_____	_____	_____
_____	_____	_____

Source(s) of value: _____

22.3.B. In Your Spouse’s Possession:

Description	Source	Value
_____	_____	_____

Attorney/Client-Privileged Information

Source(s) of value: _____

23. Safe-Deposit Boxes

a. Name of financial institution or other depository: _____

Box number: _____

Names of persons who have access to contents: _____

Items in safe-deposit box: _____

Value of items in safe-deposit box: _____

Source(s) of value: _____

b. Name of financial institution or other depository: _____

Box number: _____

Names of persons who have access to contents: _____

Items in safe-deposit box: _____

Value of items in safe-deposit box: _____

Source(s) of value: _____

24. Storage Facilities

a. Name of facility: _____

Address of facility: _____

Unit number: _____

Length of lease: _____

Terms of lease: _____

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Names of persons who have access to contents: _____

Items in storage unit: _____

Value of items in storage unit: _____

Source(s) of value: _____

b. Name of facility: _____

Address of facility: _____

Unit number: _____

Length of lease: _____

Terms of lease: _____

Names of persons who have access to contents: _____

Items in storage unit: _____

Value of items in storage unit: _____

Source(s) of value: _____

25. Community Claim for Reimbursement

(Against your or your spouse’s separate estate.)

See section entitled “Reimbursement” at the end of this document before completing 25.1 and 25.2.

25.1 Reimbursement Claim against Your Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of value: _____

25.2 Reimbursement Claim against Your Spouse’s Separate Estate:

Description of basis of claim: _____

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Amount claimed: \$ _____

Source(s) of value: _____

26. Contingent Assets

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

Nature of claim: _____

Amount of claim: _____

Source(s) of value: _____

Legal representative: _____

Address: _____

Cause number: _____

Court where case is pending: _____

Name of opposing attorney: _____

Address: _____

27. Community Liabilities

27.1 Credit Cards and Charge Accounts:

a. Name of creditor: _____

Account number: _____

Name(s) on account: _____

Current balance: \$ _____ as of _____

Source(s) of balance: _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

b. Name of creditor: _____

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Account number: _____

Name(s) on account: _____

Current balance: \$ _____ as of _____

Source(s) of balance: _____

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 _____

Source(s) of balance: _____

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 _____

Source(s) of balance: _____

Balance as of date of separation: \$ _____

Who charged what on this account? _____

Who will be responsible after divorce? _____

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27.2 Federal, State, and Local Tax Liability:

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

Amount owed for current year: \$ _____

Source(s) of amount owed: _____

27.3 Attorney's Fees in This Case:

a. You: \$ _____ as of _____

b. Your spouse: \$ _____ as of _____

27.4 Other Professional Fees in This Case:

a. You: \$ _____ as of _____

b. Your spouse: \$ _____ as of _____

27.5 Other Liabilities Not Otherwise Listed Elsewhere in This Document:

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 _____

Source(s) of balance: _____

Security, if any: _____

See section entitled "Reimbursement" at the end of this document before completing 27.6.

27.6 Reimbursement Claims against Community Estate:

Reimbursement claim by your separate estate against community estate:

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Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of amount: _____

Reimbursement claim by your spouse's separate estate against community estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of amount: _____

27.7 Pledges:

Name of recipient: _____

Address of recipient: _____

Date of pledge: _____

Total amount of pledge: \$ _____

Is pledge payable in installments? _____

If payable in installments, date each installment payment is due: _____

If payable in installments, amount of each installment: \$ _____

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

Name of creditor: _____

Name of person primarily liable: _____

Amount of contingent liability: \$ _____

Source(s) of balance: _____

Nature of contingency: _____

28. Your Separate Assets

28.1 Assets:

a. Description of asset: _____

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Date property acquired: _____

How acquired: (for example, by gift, by devise, by descent, or owned before marriage): _____

Value: \$ _____ as of _____

Source(s) of value: _____

See section entitled "Reimbursement" at the end of this document before completing 28.2 and 28.3.

28.2 Your Separate Reimbursement Claim against Community Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of value: _____

28.3 Your Separate Reimbursement Claim against Your Spouse's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of value: _____

29. Liabilities of Your Separate Estate

29.1 Liabilities:

a. Description of liability: _____

Date of liability: _____

How liability acquired: _____

Amount of liability: \$ _____ as of _____

Source(s) of amount: _____

See section entitled "Reimbursement" at the end of this document before completing 29.2 and 29.3.

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29.2 Your Spouse’s Separate Reimbursement Claim against Your Separate Estate:

Description of basis of claim: _____
Amount claimed: \$ _____
Source(s) of value: _____

29.3 Community Reimbursement Claim against Your Separate Estate:

Description of basis of claim: _____
Amount claimed: \$ _____
Source(s) of value: _____

30. Your Spouse’s Separate Assets

30.1 Assets:

a. Description of asset: _____
Date property acquired: _____
How acquired: (for example, by gift, by devise, by descent, or owned before marriage): _____

Value: \$ _____ as of _____
Source(s) of value: _____

See section entitled “Reimbursement” at the end of this document before completing 30.2 and 30.3.

30.2 Your Spouse’s Separate Reimbursement Claim against Community Estate:

Description of basis of claim: _____
Amount claimed: \$ _____
Source(s) of value: _____

30.3 Your Spouse’s Separate Reimbursement Claim against Your Separate Estate:

Description of basis of claim: _____

Attorney/Client-Privileged Information

Amount claimed: \$ _____

Source(s) of value: _____

31. Liabilities of Your Spouse's Separate Estate

31.1 Liabilities:

a. Description of liability: _____

Date of liability: _____

How liability acquired: _____

Amount of liability: \$ _____ as of _____

Source(s) of amount: _____

See section entitled "Reimbursement" at the end of this document before completing 31.2 and 31.3.

31.2 Your Separate Reimbursement Claim against Your Spouse's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of value: _____

31.3 Community Reimbursement Claim against Your Spouse's Separate Estate:

Description of basis of claim: _____

Amount claimed: \$ _____

Source(s) of value: _____

32. Children's Property

32.1 Custodial Account under Texas Uniform Transfers to Minors Act:

a. Name of financial institution: _____

Name of account: _____

Account number: _____

Amount on deposit: \$ _____ as of _____

Attorney/Client-Privileged Information

Source(s) of value/balance: _____

Name of minor for whom funds were deposited: _____

Name of custodian: _____

32.2 529 Plans:

a. Institution or entity administering the plan: _____

Designated beneficiary: _____

Is the plan a prepaid plan or savings plan? _____

Value of assets in the plan: \$ _____ as of _____

Source(s) of value: _____

32.3 Other Property:

Source(s) of value: _____

33. Assets Held by Either Party for Benefit of Another

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 _____

Source(s) of value: _____

34. Assets Held for Benefit of Either Party as Beneficiary

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

Description of assets: _____

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

Attorney/Client-Privileged Information

Name of owner of beneficial interest: _____

Value of assets: \$ _____ as of _____

Source(s) of value: _____

Reimbursement

Texas law recognizes three marital estates: the community estate, owned by the spouses together; one spouse's separate estate; and the other spouse's separate estate. A spouse's separate estate consists of (1) the property owned or claimed by the spouse before marriage; (2) the property acquired by the spouse during marriage through gift, will, or inheritance; (3) the recovery for personal injuries sustained by the spouse during marriage, except any recovery for loss of earning capacity during marriage; and (4) the property set aside to the spouse by an agreement between the spouses. The community estate consists of all other property, other than separate property, acquired by either spouse during marriage.

If any of the following has happened in your case, please circle the appropriate numbers and consult with your attorney on how to proceed, what information and documents you will need, and how to complete the items on this schedule that correspond to the numbers:

25.1, 25.2, 29.3, 31.3 Has the community estate made any payments on the unsecured liabilities of your separate estate or your spouse's separate estate?

25.1, 25.2, 29.3, 31.3 Has the community estate made any payments on the secured liabilities of your separate estate or your spouse's separate estate?

25.1, 25.2, 29.3, 31.3 Has the community estate been used to make capital improvements to your separate estate or to your spouse's separate estate other than by incurring debt?

25.1, 25.2, 29.3, 31.3 Has either spouse received inadequate compensation for the time, toil, talent, and effort spent working for a separate-property business owned by the spouse that is under the spouse's control and direction?

27.6, 28.2, 30.2 Has your separate estate or your spouse's separate estate made any payments on the unsecured liabilities of the community estate?

27.6, 28.2, 30.2 Has your separate estate or your spouse's separate estate made any payments on the secured liabilities of the community estate?

27.6, 28.2, 30.2 Has your separate estate or your spouse's separate estate been used to make capital improvements to the community estate other than by incurring debt?

28.3, 31.2 Has your separate estate made any payments on the unsecured liabilities of

Attorney/Client-Privileged Information

your spouse's separate estate?

28.3, 31.2 Has your separate estate made any payments on the secured liabilities of your spouse's separate estate?

28.3, 31.2 Has your separate estate been used to make capital improvements to your spouse's separate estate other than by incurring debt?

29.2, 30.3 Has your spouse's separate estate made any payments on the unsecured liabilities of your separate estate?

29.2, 30.3 Has your spouse's separate estate made any payments on the secured liabilities of your separate estate?

29.2, 30.3 Has your spouse's separate estate been used to make capital improvements to your separate estate other than by incurring debt?