

CAUSE NO. _____

IN THE MATTER OF
THE MARRIAGE OF

_____ and

§ IN THE DISTRICT COURT
§
§
§ 387TH JUDICIAL DISTRICT
§
§ FORT BEND COUNTY, TEXAS

SWORN INVENTORY AND APPRAISEMENT

_____, the ☐Petitioner / ☐Respondent, files this sworn 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: _____

City/County/State: _____

Description of improvements, if any: _____

Current fair market value: \$_____ ☐Appraised / ☐Estimated

Mortgage or Lien owed: \$_____ as of _____

Name(s) on mortgage: _____

Bank/Mortgage Company Name: _____

Account No. _____ Is this a VA loan? ☐Yes / ☐No

1.2. Street address: _____

City/County/State: _____

Description of improvements, if any: _____

Current fair market value: \$_____ ☐Appraised / ☐Estimated

Mortgage or Lien owed: \$_____ as of _____

Name(s) on mortgage: _____

Bank/Mortgage Company Name: _____

Account No. _____ Is this a VA loan? ☐Yes / ☐No

2. CASH AND ACCOUNTS WITH FINANCIAL INSTITUTIONS

2.1. Name of Financial Institution: _____

Account Number: _____

Type of Account: ☐ Checking / ☐ Savings / ☐ IRA / ☐ Money Market
☐ Trust / ☐ Stock Trading / ☐ Certificate of Deposit

Name(s) on account: _____

Balance: \$ _____ as of _____

2.2. Name of Financial Institution: _____

Account Number: _____

Type of Account: ☐ Checking / ☐ Savings / ☐ IRA / ☐ Money Market
☐ Trust / ☐ Stock Trading / ☐ Certificate of Deposit

Name(s) on account: _____

Balance: \$ _____ as of _____

2.3. Name of Financial Institution: _____

Account Number: _____

Type of Account: ☐ Checking / ☐ Savings / ☐ IRA / ☐ Money Market
☐ Trust / ☐ Stock Trading / ☐ Certificate of Deposit

Name(s) on account: _____

Balance: \$ _____ as of _____

2.4. Name of Financial Institution: _____

Account Number: _____

Type of Account: ☐ Checking / ☐ Savings / ☐ IRA / ☐ Money Market
☐ Trust / ☐ Stock Trading / ☐ Certificate of Deposit

Name(s) on account: _____

Balance: \$ _____ as of _____

2.5. Name of Financial Institution: _____

Account Number: _____

Type of Account: ☐ Checking / ☐ Savings / ☐ IRA / ☐ Money Market
☐ Trust / ☐ Stock Trading / ☐ Certificate of Deposit

Name(s) on account: _____

Balance: \$ _____ as of _____

3. ACCOUNTS RECEIVABLE

- 3.1. Name of Debtor: _____
Debtor's Relationship to you: _____
Purpose of Loan: _____
Is the debt evidenced in writing? ☐ Yes / ☐ No - If "Yes" attach a copy
Is the debt secured? ☐ Yes / ☐ No - If "Yes" describe: _____

Current loan balance: \$ _____ as of _____
- 3.2. Name of Debtor: _____
Debtor's Relationship to you: _____
Purpose of Loan: _____
Is the debt evidenced in writing? ☐ Yes / ☐ No - If "Yes" attach a copy
Is the debt secured? ☐ Yes / ☐ No - If "Yes" describe: _____

Current loan balance: \$ _____ as of _____
- 3.3. Name of Debtor: _____
Debtor's Relationship to you: _____
Purpose of Loan: _____
Is the debt evidenced in writing? ☐ Yes / ☐ No - If "Yes" attach a copy
Is the debt secured? ☐ Yes / ☐ No - If "Yes" describe: _____

Current loan balance: \$ _____ as of _____
- 3.4. Name of Debtor: _____
Debtor's Relationship to you: _____
Purpose of Loan: _____
Is the debt evidenced in writing? ☐ Yes / ☐ No - If "Yes" attach a copy
Is the debt secured? ☐ Yes / ☐ No - If "Yes" describe: _____

Current loan balance: \$ _____ as of _____

4. RETIREMENT ACCOUNTS

- 4.1. Name of Financial Institution: _____
Account Number: _____
Type of Account: ☐ 401K / ☐ KEOGH / ☐ Defined Benefits
Name(s) on account: _____
Payee of survivor benefits: _____
Current Balance: \$_____ (attach most recent statement)
Value on date married: \$_____ (if more than \$0 attach proof)
- 4.2. Name of Financial Institution: _____
Account Number: _____
Type of Account: ☐ 401K / ☐ KEOGH / ☐ Defined Benefits
Name(s) on account: _____
Payee of survivor benefits: _____
Current Balance: \$_____ (attach most recent statement)
Value on date married: \$_____ (if more than \$0 attach proof)
- 4.3. Name of Financial Institution: _____
Account Number: _____
Type of Account: ☐ 401K / ☐ KEOGH / ☐ Defined Benefits
Name(s) on account: _____
Payee of survivor benefits: _____
Current Balance: \$_____ (attach most recent statement)
Value on date married: \$_____ (if more than \$0 attach proof)
- 4.4. Name of Financial Institution: _____
Account Number: _____
Type of Account: ☐ 401K / ☐ KEOGH / ☐ Defined Benefits
Name(s) on account: _____
Payee of survivor benefits: _____
Current Balance: \$_____ (attach most recent statement)
Value on date married: \$_____ (if more than \$0 attach proof)

5. COMPANY AND/OR GOVERNMENT RETIREMENT BENEFITS

| Employer/Sponsor: _____
Plan Administrator: _____
Plan type: ☐Company ☐Government ☐Military ☐Rail Road ☐Other
Employee Starting Date: _____
☐ Years / ☐ Months credible service - current: _____
☐ Years / ☐ Months credible service - on date of marriage: _____
Percentage employee is vested: _____
Is there a loan against this plan? ☐ Yes / ☐ No; If "Yes" balance\$ _____
Current value of plan: \$ _____ attach most recent statement

| Employer/Sponsor: _____
Plan Administrator: _____
Plan type: ☐Company ☐Government ☐Military ☐Rail Road ☐Other
Employee Starting Date: _____
☐ Years / ☐ Months credible service - current: _____
☐ Years / ☐ Months credible service - on date of marriage: _____
Percentage employee is vested: _____
Is there a loan against this plan? ☐ Yes / ☐ No; If "Yes" balance\$ _____
Current value of plan: \$ _____ attach most recent statement

| Employer/Sponsor: _____
Plan Administrator: _____
Plan type: ☐Company ☐Government ☐Military ☐Rail Road ☐Other
Employee Starting Date: _____
☐ Years / ☐ Months credible service - current: _____
☐ Years / ☐ Months credible service - on date of marriage: _____
Percentage employee is vested: _____
Is there a loan against this plan? ☐ Yes / ☐ No; If "Yes" balance\$ _____
Current value of plan: \$ _____ attach most recent statement

6. HUSBAND'S OTHER DEFERRED COMPENSATION BENEFITS

6.1 Description of benefits:: _____

Value:_____ Vesting date:_____

Is Husband vested? ☐ Yes ☐ No; If "No" what event triggers vestment?

6.2 Description of benefits:: _____

Value:_____ Vesting date:_____

Is Husband vested? ☐ Yes ☐ No; If "No" what event triggers vestment?

7. WIFE'S OTHER DEFERRED COMPENSATION BENEFITS

7.1 Description of benefits:: _____

Value:_____ Vesting date:_____

Is Wife vested? ☐ Yes ☐ No; If "No" what event triggers vestment?

7.2 Description of benefits:: _____

Value:_____ Vesting date:_____

Is Wife vested? ☐ Yes ☐ No; If "No" what event triggers vestment?

8. LIFE INSURANCE AND ANNUITIES

I Company Name: _____

Policy type: ☐ Term ☐ Whole Life ☐ Universal ☐ Annuity ☐ Other Name
of Insured:_____ Owner: ☐ Yes ☐ No

Beneficiary:_____ Owner: ☐ Yes ☐ No

Monthly Premium \$_____ Next payment due:_____

Date issued:_____ Face Value: \$_____

Cash surrender value on date of marriage: \$_____

Current cash surrender value: \$_____

Is there a loan against? ☐ Yes ☐ No If "Yes" what is owed: \$_____

! Company Name: _____
Policy type: ☐Term ☐Whole Life ☐Universal ☐Annuity ☐Other Name
of Insured: _____ Owner: ☐Yes ☐No
Beneficiary: _____ Owner: ☐Yes ☐No
Monthly Premium \$ _____ Next payment due: _____
Date issued: _____ Face Value: \$ _____
Cash surrender value on date of marriage: \$ _____
Current cash surrender value: \$ _____
Is there a loan against? ☐Yes ☐No If "Yes" what is owed: \$ _____

! Company Name: _____
Policy type: ☐Term ☐Whole Life ☐Universal ☐Annuity ☐Other Name
of Insured: _____ Owner: ☐Yes ☐No
Beneficiary: _____ Owner: ☐Yes ☐No
Monthly Premium \$ _____ Next payment due: _____
Date issued: _____ Face Value: \$ _____
Cash surrender value on date of marriage: \$ _____
Current cash surrender value: \$ _____
Is there a loan against? ☐Yes ☐No If "Yes" what is owed: \$ _____

! Company Name: _____
Policy type: ☐Term ☐Whole Life ☐Universal ☐Annuity ☐Other Name
of Insured: _____ Owner: ☐Yes ☐No
Beneficiary: _____ Owner: ☐Yes ☐No
Monthly Premium \$ _____ Next payment due: _____
Date issued: _____ Face Value: \$ _____
Cash surrender value on date of marriage: \$ _____
Current cash surrender value: \$ _____
Is there a loan against? ☐Yes ☐No If "Yes" what is owed: \$ _____

9. PUBLICLY TRADED STOCKS, BONDS, AND OTHER SECURITIES

9. Security Name: _____
Security type: ☐Stock ☐Futures ☐Treasury Bills ☐Bonds ☐Options
Certificate numbers: _____
Current Market Value of all shares /contracts controlled: \$ _____
Who has possession: _____ Exchange listed: _____
Pledged?: ☐Yes ☐No If "Yes", give details: _____

92 Security Name: _____
Security type: ☐Stock ☐Futures ☐Treasury Bills ☐Bonds ☐Options
Certificate numbers: _____
Current Market Value of all shares /contracts controlled: \$ _____
Who has possession: _____ Exchange listed: _____
Pledged?: ☐Yes ☐No If "Yes", give details: _____

93 Security Name: _____
Security type: ☐Stock ☐Futures ☐Treasury Bills ☐Bonds ☐Options
Certificate numbers: _____
Current Market Value of all shares /contracts controlled: \$ _____
Who has possession: _____ Exchange listed: _____
Pledged?: ☐Yes ☐No If "Yes", give details: _____

94 Security Name: _____
Security type: ☐Stock ☐Futures ☐Treasury Bills ☐Bonds ☐Options
Certificate numbers: _____
Current Market Value of all shares /contracts controlled: \$ _____
Who has possession: _____ Exchange listed: _____
Pledged?: ☐Yes ☐No If "Yes", give details: _____

10. CLOSELY HELD BUSINESS INTERESTS

10.1 Name of Business: _____
☐Sole Proprietorship ☐Partnership ☐d/b/a ☐LLC ☐Inc ☐PA/PC Date
Business began:_____Percentage owned: _____
Estimated Value: \$ _____as of _____

10.2 Name of Business: _____
☐Sole Proprietorship ☐Partnership ☐d/b/a ☐LLC ☐Inc ☐PA/PC Date
Business began:_____Percentage owned: _____
Estimated Value: \$ _____as of _____

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

11.1 Year: _____ Make: _____ Model: _____
Name on Title:_____Plate: _____
In possession of:_____VIN: _____
Lien Holder:_____Acct #: _____
Amt owed: \$ _____as of _____Value: \$ _____

11.2 Year: _____ Make: _____ Model: _____
Name on Title:_____Plate: _____
In possession of:_____VIN: _____
Lien Holder:_____Acct #: _____
Amt owed: \$ _____as of _____Value: \$ _____

11.3 Year: _____ Make: _____ Model: _____
Name on Title:_____Plate: _____
In possession of:_____VIN: _____
Lien Holder:_____Acct #: _____
Amt owed: \$ _____as of _____Value: \$ _____

MOTOR VEHICLES, BOATS, AIRPLANES, CYCLES, ETC. (Cont.)

11.4 Year: _____ Make: _____ Model: _____
Name on Title: _____ Plate: _____
In possession of: _____ VIN: _____
Lien Holder: _____ Acct #: _____
Amt owed: \$ _____ as of _____ Value: \$ _____

11.5 Year: _____ Make: _____ Model: _____
Name on Title: _____ Plate: _____
In possession of: _____ VIN: _____
Lien Holder: _____ Acct #: _____
Amt owed: \$ _____ as of _____ Value: \$ _____

11.6 Year: _____ Make: _____ Model: _____
Name on Title: _____ Plate: _____
In possession of: _____ VIN: _____
Lien Holder: _____ Acct #: _____
Amt owed: \$ _____ as of _____ Value: \$ _____

12 MISCELLANEOUS ITEMS IN HUSBAND'S POSSESSION

12.1 Furniture: \$ _____
12.2 Antiques: \$ _____
12.3 Artwork \$ _____
12.4 Household misc. \$ _____
12.5 Firearms: \$ _____
12.6 Sporting Equipment: \$ _____
12.7 Hand Tools: \$ _____
12.8 Power Tools: \$ _____
12.9 Garden Tools/Equip. \$ _____
12.10 Collectibles: \$ _____
12.11 Jewelry/watches: \$ _____
12.12 Clothing/furs \$ _____

TOTAL MISC. ITEMS IN H'S POSSESSION: \$ _____

13. MISCELLANEOUS ITEMS IN WIFE'S POSSESSION

- 13.1 Furniture: \$ _____
- 13.2 Antiques: \$ _____
- 13.3 Artwork \$ _____
- 13.4 Household misc. \$ _____
- 13.5 Firearms: \$ _____
- 13.6 Sporting Equipment: \$ _____
- 13.7 Hand Tools: \$ _____
- 13.8 Power Tools: \$ _____
- 13.9 Garden Tools/Equip. \$ _____
- 13.10 Collectibles: \$ _____
- 13.11 Jewelry/watches: \$ _____
- 13.12 Clothing/furs \$ _____

TOTAL MISC. ITEMS IN W'S POSSESSION: \$ _____

14. LIVESTOCK

- 14.1 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 14.2 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 14.3 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 14.4 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 14.5 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____

15. TRAVEL ACCOUNTS

15.1 Description: _____

In possession of: ☐ Husband ☐ Wife Value: \$ _____

Account/Membership #: _____

15.2 Description: _____

In possession of: ☐ Husband ☐ Wife Value: \$ _____

Account/Membership #: _____

15.3 Description: _____

In possession of: ☐ Husband ☐ Wife Value: \$ _____

Account/Membership #: _____

15.4 Description: _____

In possession of: ☐ Husband ☐ Wife Value: \$ _____

Account/Membership #: _____

16. CLUB MEMBERSHIPS

16.1 Name of club: _____

Value: \$ _____ Account/Membership #: _____

Method of valuation: _____

16.2 Name of club: _____

Value: \$ _____ Account/Membership #: _____

Method of valuation: _____

16.3 Name of club: _____

Value: \$ _____ Account/Membership #: _____

Method of valuation: _____

17. MISCELLANEOUS ASSETS NOT OTHERWISE DISCLOSED

- 17.1 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.2 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.3 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.4 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.5 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.6 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.7 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.8 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.9 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.10 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.11 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____
- 17.12 Description: _____
In possession of: ☐ Husband ☐ Wife Value: \$ _____

18. COMMUNITY CLAIM FOR REIMBURSEMENT

- 18.1 Description: _____
Amt. Claimed: \$ _____ Claimed against: ☐ Husband ☐ Wife
Details: _____
- 18.2 Description: _____
Amt. Claimed: \$ _____ Claimed against: ☐ Husband ☐ Wife
Details: _____
- 18.3 Description: _____
Amt. Claimed: \$ _____ Claimed against: ☐ Husband ☐ Wife
Details: _____
- 18.4 Description: _____
Amt. Claimed: \$ _____ Claimed against: ☐ Husband ☐ Wife
Details: _____

19. CREDIT CARDS ADN UNSECURED CHARGE ACCOUNTS

- 19.1 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.2 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.3 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.4 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____

CREDIT CARDS AND UNSECURED CHARGE ACCOUNTS (cont.)

- 19.5 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.6 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.7 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.8 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.9 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____
- 19.10 Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____

20. FEDERAL, STATE, AND LOCAL TAX LIABILITY

- 20.1 Taxing Authority Name: _____
Amt. owed for current year: \$ _____
Amt. owed for previous years: \$ _____
- 20.2 Taxing Authority Name: _____
Amt. owed for current year: \$ _____
Amt. owed for previous years: \$ _____

21. HUSBAND'S SEPARATE ESTATE

21.1 Description: _____
Date acquired: _____ How acquired: _____
Value: \$ _____ Liability, if any: \$ _____
Details of why this property is separate: _____

21.2 Description: _____
Date acquired: _____ How acquired: _____
Value: \$ _____ Liability, if any: \$ _____
Details of why this property is separate: _____

21.3 Description: _____
Date acquired: _____ How acquired: _____
Value: \$ _____ Liability, if any: \$ _____
Details of why this property is separate: _____

22. WIFE'S SEPARATE ESTATE

22.1 Description: _____
Date acquired: _____ How acquired: _____
Value: \$ _____ Liability, if any: \$ _____
Details of why this property is separate: _____

22.2 Description: _____
Date acquired: _____ How acquired: _____
Value: \$ _____ Liability, if any: \$ _____
Details of why this property is separate: _____

WIFE'S SEPARATE ESTATE (cont.)

22.3 Description: _____
Date acquired: _____ How acquired: _____
Value: \$_____ Liability, if any: \$_____
Details of why this property is separate: _____

23. HUSBAND'S SEPARATE ESTATE CLAIMS

23.1 Claims against Community: \$_____
Details: _____

23.1 Claims against Wife's Separate Estate: \$_____
Details: _____

24. WIFE'S SEPARATE ESTATE CLAIMS

24.1 Claims against Community: \$_____
Details: _____

24.1 Claims against Husband's Separate Estate: \$_____
Details: _____

25. DEBTS NOT LISTED ABOVE

25.1 Description: _____
Amt. owed: \$_____ Name on account: ☐ Husband ☐ Wife
Details: _____

25.2 Description: _____
Amt. owed: \$_____ Name on account: ☐ Husband ☐ Wife
Details: _____

25.3 Description: _____
Amt. owed: \$_____ Name on account: ☐ Husband ☐ Wife
Details: _____

DEBTS NOT LISTED ABOVE (cont.)

Description: _____
Amt. owed: \$ _____ Name on account: ☐ Husband ☐ Wife
Details: _____

VERIFICATION

STATE OF TEXAS §

FORT BEND COUNTY §

I, _____, state on oath that, to the best of my knowledge and belief, the foregoing inventory and appraisal contains:

- a. 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;
- b. 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
- c. 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. Furthermore, 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 _____, 20____.

SIGNED under oath before me this _____ day of _____, 20____.

Notary Public, State of Texas