

CLIENT NAME: \_\_\_\_\_

**CLIENT QUESTIONNAIRE - Inventory and Appraisalment.**

**Community Estate of the Parties**

**1. Real Property** (include any property purchased by contract for deed, such as Texas Veterans Land Board property, property purchased in recreational developments, and time-shares)

1.1. The parties own no community real property.

**2. Mineral Interests** (include any property in which the parties own the mineral estate, separate and apart from the surface estate, such as oil and gas leases; also include royalty interests, working interests, and producing and nonproducing oil and gas wells)

2.1. The parties own no community mineral interests

**3. Cash and Accounts with Financial Institutions** (include cash, traveler's checks, money orders, and accounts with commercial banks, savings banks, credit unions, and funds on deposit with attorneys and other third parties; exclude accounts with brokerage houses and all retirement accounts)

3.1. Cash on hand: \_\_\_\_\_

3.2. Traveler's checks: \_\_\_\_\_

3.3. Money orders: \_\_\_\_\_

3.4. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.5. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.6. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

3.7. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

Type of account: (checking/savings/money market/certificate of deposit) \_\_\_\_\_

Name(s) on withdrawal cards: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

#### **4. Brokerage and Mutual Fund Accounts**

4.1. The parties own no community brokerage or mutual fund accounts.

#### **5. Publicly Traded Stocks, Bonds, and Other Securities** (include securities not in a brokerage account, mutual fund, or retirement fund)

5.1. The parties own no community stocks, bonds, or other securities.

#### **6. Stock Options** (include all exercisable, nonexercisable, vested and nonvested stock options regardless of any restrictions on transfer)

6.1. The parties own no community stock options.

**7. Bonuses**

7.1. Name of company: \_\_\_\_\_

Spouse earning bonus: \_\_\_\_\_

Date bonus expected to be paid: \_\_\_\_\_

Time period covered by bonus: \_\_\_\_\_

Anticipated amount of bonus: \$ \_\_\_\_\_

7.2. Name of company: \_\_\_\_\_

Spouse earning bonus: \_\_\_\_\_

Date bonus expected to be paid: \_\_\_\_\_

Time period covered by bonus: \_\_\_\_\_

Anticipated amount of bonus: \$ \_\_\_\_\_

**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)

8.1. The parties own no closely held business interests.

**9. Retirement Benefits**

A. *IRA/SEP*

9.1. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

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

Designated beneficiary: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):

\$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):

\$ \_\_\_\_\_

9.2. Name of financial institution: \_\_\_\_\_

Account name: \_\_\_\_\_

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

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

Designated beneficiary: \_\_\_\_\_

Current account balance (as of \_\_\_\_\_):

\$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):

\$ \_\_\_\_\_

**10. Other Deferred Compensation Benefits** (e.g., worker's compensation, disability benefits, other "special payments", and other forms of compensation)

10.1. Husband

Description of Asset	Value
_____	
_____	
_____	

10.2. Wife

Description of Asset	Value
_____	
_____	
_____	

**11. Union Benefits** (include all insurance, pensions, retirement benefits, and other benefits arising out of membership in any union)

11.1. Name of union member: \_\_\_\_\_

Name of Union: \_\_\_\_\_

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

Value (as of \_\_\_\_\_):\$ \_\_\_\_\_

11.2. Name of union member: \_\_\_\_\_

Name of Union: \_\_\_\_\_

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

Value (as of \_\_\_\_\_):\$ \_\_\_\_\_

## 12. Insurance and Annuities

### 12.A. Life Insurance

12.A.1. Name of insurance company: \_\_\_\_\_

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

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

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

Type of insurance: [term/whole/universal]

Amount of premiums [monthly/quarterly/semiannually]:  
\$ \_\_\_\_\_

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

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

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

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

Designated beneficiary: \_\_\_\_\_

Balance of loan against policy: \$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

12.A.2. Name of insurance company: \_\_\_\_\_

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

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

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

Type of insurance: [term/whole/universal]

Amount of premiums [monthly/quarterly/semiannually]:  
\$ \_\_\_\_\_

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

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

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

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

Designated beneficiary: \_\_\_\_\_

Balance of loan against policy: \$ \_\_\_\_\_

Value of community interest (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**13. Motor Vehicles, Boats, Airplanes, Cycles, etc.** (including mobile homes, trailers, and recreational vehicles; exclude company-owned vehicles)

13.1. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

In possession of: \_\_\_\_\_

Vehicle identification number: \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Current fair market value of vehicle (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Current net equity in vehicle: \$ \_\_\_\_\_

13.2. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

In possession of: \_\_\_\_\_

Vehicle identification number: \_\_\_\_\_

Fair market value of vehicle: \$ \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Current net equity in vehicle: \$ \_\_\_\_\_

13.3. Year: \_\_\_\_\_

Make: \_\_\_\_\_

Model: \_\_\_\_\_

Name on title: \_\_\_\_\_

In possession of: \_\_\_\_\_

Vehicle identification number: \_\_\_\_\_

Fair market value of vehicle: \$ \_\_\_\_\_

Name of creditor if loan against vehicle: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Current net equity in vehicle: \$ \_\_\_\_\_

**14. Money Owed to Me or My Spouse** (include any expected federal or state income tax refund but do not include receivables connected with a business)

14.1. Name of debtor: \_\_\_\_\_

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

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

14.2. Name of debtor: \_\_\_\_\_

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

Is debt evidenced in writing? [Yes/No]

Is debt secured? [Yes/No]

Current loan amount owed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**15. Household Furniture, Furnishings, and Fixtures**

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**16. Electronics and Computers**

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



Description of Asset	Value
_____	
_____	
_____	

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

Description of Asset	Value
_____	
_____	
_____	

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

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

Description of Asset	Value
_____	
_____	
_____	

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

Description of Asset	Value
_____	
_____	
_____	

**18. Miscellaneous Sporting Goods and Firearms**

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

Description of Asset	Value
_____	
_____	
_____	

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

Description of Asset	Value
_____	
_____	
_____	

**19. Jewelry and Other Personal Items**

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**20. Livestock (include cattle, horses, and so forth)**

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

**21. Club Memberships**

21.1. Name of club: \_\_\_\_\_

Name membership held in: \_\_\_\_\_

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

Current value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Method of valuation: \_\_\_\_\_

21.2. Name of club: \_\_\_\_\_

Name membership held in: \_\_\_\_\_

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

Current value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Method of valuation: \_\_\_\_\_

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

22.1. Name of airline: \_\_\_\_\_

Account number and name on account: \_\_\_\_\_,  
\_\_\_\_\_

Current number of miles (as of \_\_\_\_\_):  
\_\_\_\_\_

Current value (if any): \$ \_\_\_\_\_

22.2. Name of airline: \_\_\_\_\_

Account number and name on account: \_\_\_\_\_,  
\_\_\_\_\_

Current number of miles (as of \_\_\_\_\_):  
\_\_\_\_\_

Value (if any): \$ \_\_\_\_\_

**23. Miscellaneous Assets** (include intellectual property, licenses, crops, farm equipment, construction equipment, tools, leases, cemetery lots, gold or silver coins not part of a collection described elsewhere in this inventory, estimated tax payments, tax overpayments, loss carry-forward deductions, lottery tickets/winnings, stadium bonds, stadium seat licenses, seat options, and season tickets)

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset

Value

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**24. Safe-Deposit Boxes**

24.1. Name of financial institution or other depository: \_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_

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Items in safe-deposit box: \_\_\_\_\_

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24.2. Name of financial institution or other depository: \_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_

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Items in safe-deposit box: \_\_\_\_\_

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24.3. Name of financial institution or other depository: \_\_\_\_\_

Box number: \_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_

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Items in safe-deposit box: \_\_\_\_\_

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**25. Storage Facilities**

25.1. Name and location: \_\_\_\_\_

Unit number: \_\_\_\_\_

Terms and length of lease: \_\_\_\_\_

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Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in storage unit: \_\_\_\_\_  
\_\_\_\_\_

25.2. Name and location: \_\_\_\_\_

Unit number: \_\_\_\_\_

Terms and length of lease: \_\_\_\_\_  
\_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in storage unit: \_\_\_\_\_  
\_\_\_\_\_

25.3. Name and location: \_\_\_\_\_

Unit number: \_\_\_\_\_

Terms and length of lease: \_\_\_\_\_  
\_\_\_\_\_

Names of persons with access to contents: \_\_\_\_\_  
\_\_\_\_\_

Items in storage unit: \_\_\_\_\_  
\_\_\_\_\_

**26. Community Claim for Reimbursement**

26.1. Reimbursement claim against husband's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

26.2. Reimbursement claim against wife's separate estate:

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

27.1. Nature of claim: \_\_\_\_\_

Amount of claim: \$ \_\_\_\_\_

27.2. Nature of claim: \_\_\_\_\_

Amount of claim: \$ \_\_\_\_\_

**28. Community Liabilities**

*28.A. Credit Cards and Charge Accounts*

28.A.1. Name of creditor: \_\_\_\_\_

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

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

28.A.2. Name of creditor: \_\_\_\_\_

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

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

28.A.3. Name of creditor: \_\_\_\_\_

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

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

28.A.4. Name of creditor: \_\_\_\_\_

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

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

28.A.5. Name of creditor: \_\_\_\_\_

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

Name(s) on account: \_\_\_\_\_

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

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

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

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

28.B.2. Amount owed in any previous tax year:  
<\$ \_\_\_\_\_>  
[describe liability, e.g., federal income tax/property taxes]

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

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

28.C.1. Husband (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

28.C.2. Wife (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

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

28.D.1. Husband (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

28.D.2. Wife (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

28.E. *Other Liabilities Not Otherwise Listed in This Inventory* (e.g., loans, margin accounts, if not previously disclosed)

28.E.1. Name of creditor: \_\_\_\_\_

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

Party incurring liability: \_\_\_\_\_

Is loan evidenced in writing? [Yes/No]

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Security, if any: \_\_\_\_\_

28.E.2. Name of creditor: \_\_\_\_\_

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

Party incurring liability: \_\_\_\_\_

Is loan evidenced in writing? [Yes/No]

Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

Security, if any: \_\_\_\_\_



28.E.3. Name of creditor: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Party incurring liability: \_\_\_\_\_  
Is loan evidenced in writing? [Yes/No]  
Current balance (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>  
Security, if any: \_\_\_\_\_

28.F. *Reimbursement Claims against Community Estate*

28.F.1. Reimbursement claim by husband's separate estate:  
Basis of claim: \_\_\_\_\_  
Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

28.F.2. Reimbursement claim by wife's separate estate:  
Basis of Claim: \_\_\_\_\_  
Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

28.G. *Pledges (include charitable, church and school related)*

28.G.1. Name and address of recipient: \_\_\_\_\_  
Date of pledge: \_\_\_\_\_  
Total amount of pledge: < \_\_\_\_\_ >  
Is pledge payable in installments? [Yes/No]  
Date each installment payment is due: \_\_\_\_\_  
Amount of each installment: \_\_\_\_\_

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

28.H.1. Name of creditor: \_\_\_\_\_

Name of person primarily liable: \_\_\_\_\_

Amount of contingent liability: <\$ \_\_\_\_\_>

Nature of contingency: \_\_\_\_\_

28.H.2. Name of creditor: \_\_\_\_\_

Name of person primarily liable: \_\_\_\_\_

Amount of contingent liability: <\$ \_\_\_\_\_>

Nature of contingency: \_\_\_\_\_

### Separate Estates of the Parties

**29. Separate Assets of Husband** (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)

29.1. Description of asset: \_\_\_\_\_

Date property acquired: \_\_\_\_\_

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

Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of claim: \_\_\_\_\_

Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**30. Liabilities of Husband's Separate Estate**

30.1. Description of liability: \_\_\_\_\_  
Date of liability: \_\_\_\_\_  
How liability acquired: \_\_\_\_\_  
Amount of liability (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

30.2. Wife's separate reimbursement claim against husband's separate estate:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

30.3. Community estate's reimbursement claim against husband's separate estate:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**31. Separate Assets of Wife** (generally defined as assets owned before marriage or assets acquired during marriage by gift or inheritance or as a result of personal injury)

31.1. Description of asset: \_\_\_\_\_  
Date property acquired: \_\_\_\_\_  
How acquired (e.g., by gift, by devise, by descent, or owned before marriage):  
\_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

31.2. Wife's separate reimbursement claim against community estate:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

31.3. Wife's separate reimbursement claim against husband's separate estate:  
Basis of claim: \_\_\_\_\_  
Value (as of \_\_\_\_\_): \$ \_\_\_\_\_

**32. Liabilities of Wife's Separate Estate**

32.1. Description of liability: \_\_\_\_\_

Date of liability: \_\_\_\_\_

How liability acquired: \_\_\_\_\_

Amount of liability (as of \_\_\_\_\_):  
<\$ \_\_\_\_\_>

32.2. Husband's separate property reimbursement claim against wife's separate estate:

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

Basis of Claim: \_\_\_\_\_

Amount claimed (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**Child's Property**

**33. Child's Property** (e.g., custodial accounts under the Texas Uniform Gifts to Minors Act or Uniform Transfers to Minors Act, 529 plans)

A. *Custodial Account under Texas Uniform Transfers to Minors Act*

33.A.1. Name of financial institution: \_\_\_\_\_

Address of financial institution: \_\_\_\_\_

Name of account: \_\_\_\_\_

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

Amount on deposit (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

Name of minor for whom funds were deposited: \_\_\_\_\_

33.A.2. Name of financial institution: \_\_\_\_\_  
Address of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_

33.A.3. Name of financial institution: \_\_\_\_\_  
Address of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_

33.A.4. Name of financial institution: \_\_\_\_\_  
Address of financial institution: \_\_\_\_\_  
Name of account: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Amount on deposit (as of \_\_\_\_\_):  
\$ \_\_\_\_\_  
Name of minor for whom funds were deposited: \_\_\_\_\_

B. *529 Plan*

33.B.1. Institution or entity administering plan: \_\_\_\_\_  
Designated beneficiary: \_\_\_\_\_  
Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.B.2. Institution or entity administering plan: \_\_\_\_\_

Designated beneficiary: \_\_\_\_\_

Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.B.3. Institution or entity administering plan: \_\_\_\_\_

Designated beneficiary: \_\_\_\_\_

Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

33.B.4. Institution or entity administering plan: \_\_\_\_\_

Designated beneficiary: \_\_\_\_\_

Type of plan: \_\_\_\_\_

Value of assets in plan (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

### Trust and Estate Assets

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

34.1. Name(s) of person(s) holding assets: \_\_\_\_\_

Description of assets: \_\_\_\_\_  
\_\_\_\_\_

Name and title of fiduciary (e.g., executor, trustee): \_\_\_\_\_  
\_\_\_\_\_

Name of owner of beneficial interest: \_\_\_\_\_  
\_\_\_\_\_

Value of assets (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

34.2. Name(s) of person(s) holding assets: \_\_\_\_\_

Description of assets: \_\_\_\_\_  
\_\_\_\_\_

Name and title of fiduciary (e.g., executor, trustee): \_\_\_\_\_  
\_\_\_\_\_

Name of owner of beneficial interest: \_\_\_\_\_

Value of assets (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

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

35.1. Name(s) of person(s) holding assets:

Description of assets: \_\_\_\_\_

Name and title of fiduciary (e.g., executor, trustee): \_\_\_\_\_  
\_\_\_\_\_

Name of owner of beneficial interest: \_\_\_\_\_

Value of assets (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

35.2. Name(s) of person(s) holding assets:

Description of assets: \_\_\_\_\_

Name and title of fiduciary (e.g., executor, trustee): \_\_\_\_\_  
\_\_\_\_\_

Name of owner of beneficial interest: \_\_\_\_\_

Value of assets (as of \_\_\_\_\_):  
\$ \_\_\_\_\_

**Declaration**

I, \_\_\_\_\_, state that, to the best of my knowledge and belief, this inventory and appraisal contains -

1. a full and complete list of all properties that I claim belong to the community estate of me and my spouse, with the values thereof;
2. a full and complete list of all properties in my possession or subject to my control that I claim or admit are my or my spouse's separate property and estate, with the values thereof; and
3. a full and complete list of the debts that I claim are community indebtedness.

Any omission from this inventory is not intentional but is done through mere inadvertence and not to mislead my spouse. There may be other assets and liabilities of which my spouse is aware, and the omission of those items from this inventory should not be construed as a waiver of my interest in them.

\_\_\_\_\_

My name is \_\_\_\_\_, my date of birth is \_\_\_\_\_ and my address is \_\_\_\_\_, United States. I

declare under penalty of perjury that the foregoing is true and correct.

Executed in MONTGOMERY County, Texas, on \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_, Declarant