

NO. \_\_\_\_\_

IN THE MATTER OF  
THE MARRIAGE OF

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IN THE DISTRICT COURT

\_\_\_\_\_  
AND

\_\_\_\_\_  
DISTRICT COURT

\_\_\_\_\_  
AND IN THE INTEREST OF

\_\_\_\_\_  
MINOR CHILDREN

DALLAS COUNTY, TEXAS

**INVENTORY AND APPRAISEMENT OF**

\_\_\_\_\_, \_\_\_\_\_, submits this inventory and appraisement of all assets and liabilities, community and separate estates, as follows:

**I. Community Property**

**A. Real Estate**

1. Property located at \_\_\_\_\_

FMV                   \$ \_\_\_\_\_  
Lien                   \$ \_\_\_\_\_  
Equity                 \$ \_\_\_\_\_

**B. Accounts in Financial Institutions**

1. \_\_\_\_\_  
Checking Acct. No. \_\_\_\_\_  
in the name of \_\_\_\_\_

Balance as of \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_  
Checking Acct. No. \_\_\_\_\_  
in the name of \_\_\_\_\_

Balance as of \_\_\_\_\_ \$ \_\_\_\_\_

3. \_\_\_\_\_  
Checking Acct. No. \_\_\_\_\_

in the name of \_\_\_\_\_

Balance as of \_\_\_\_\_ \$ \_\_\_\_\_

4. \_\_\_\_\_  
Checking Acct. No. \_\_\_\_\_  
in the name of \_\_\_\_\_

Balance as of \_\_\_\_\_ \$ \_\_\_\_\_

5. Uncashed Paychecks of \_\_\_\_\_ \$ \_\_\_\_\_

**C. Accounts Receivable**

**D. Retirement Accounts**

1. \_\_\_\_\_  
account in name of \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_  
account in name of \_\_\_\_\_ \$ \_\_\_\_\_

**E. Company Retirement Accounts**

1. \_\_\_\_\_  
Account in name of \_\_\_\_\_  
Community Interest \$ \_\_\_\_\_  
Loans \$ \_\_\_\_\_  
Balance as of \_\_\_\_\_ \$ \_\_\_\_\_

**F. Life Insurance and Annuities**

1. Life, Term Life policy, Life accident disability  
In the name of \_\_\_\_\_  
Cash surrender value: \$ \_\_\_\_\_  
Premiums: \$ \_\_\_\_\_  
Date of Issue: \_\_\_\_\_  
Face Amount: \_\_\_\_\_  
Beneficiary: \_\_\_\_\_  
Loan Against Policy: \_\_\_\_\_

**G. Publicly Traded Stocks, Bonds and Other Securities**

1. \_\_\_\_\_  
in the name of \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_  
in the name of \_\_\_\_\_ \$ \_\_\_\_\_

**H. Closely Held Business Interests**

**I. Motor Vehicles, Boats, Airplanes, Cycles, Etc.**

\_\_\_\_\_ # \_\_\_\_\_  
in the name of \_\_\_\_\_ \$ \_\_\_\_\_  
Liens \$ \_\_\_\_\_

\_\_\_\_\_ # \_\_\_\_\_  
in the name of \_\_\_\_\_ \$ \_\_\_\_\_  
Liens \$ \_\_\_\_\_

\_\_\_\_\_ # \_\_\_\_\_  
in the name of \_\_\_\_\_ \$ \_\_\_\_\_  
Liens \$ \_\_\_\_\_

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

1. In Wife's possession \$ \_\_\_\_\_

2. In Husband's possession \$ \_\_\_\_\_

**K. Miscellaneous Sporting Goods and Firearms**

\_\_\_\_\_

**II. Wife's Separate Property**

A. Jewelry/clothing \$ \_\_\_\_\_

B. Other \$ \_\_\_\_\_

**III. Husband's Separate Property**

A. Jewelry/clothing \$ \_\_\_\_\_

B. Other \$ \_\_\_\_\_

**IV. Community Debts/Liabilities**

**A. Attorneys' Fees**

- 1. Wife \$ \_\_\_\_\_
- 2. Husband \$ \_\_\_\_\_

**B. Credit Cards & Charge Accounts**

- 1. In Husband's possession
  - a. \_\_\_\_\_  
Acc# \_\_\_\_\_  
Current balance: \$ \_\_\_\_\_
  - b. \_\_\_\_\_  
Acc# \_\_\_\_\_  
Current balance \$ \_\_\_\_\_
- 2. In Wife's possession
  - a. \_\_\_\_\_  
Acc# \_\_\_\_\_  
Current balance: \$ \_\_\_\_\_
  - b. \_\_\_\_\_  
Acc# \_\_\_\_\_  
Current balance \$ \_\_\_\_\_

**C. Other Liabilities not Previously Listed in this Inventory**

- a. \_\_\_\_\_  
Acc# \_\_\_\_\_  
Balance: \$ \_\_\_\_\_

**TOTAL COMMUNITY DEBT/LIABILITY** \$ \_\_\_\_\_

**V. Trust Estate and Custodial Assets**

**A. Assets Held by or for Either Party as a Fiduciary or a Beneficiary**

**VI. Separate Estates of the Parties**

**A. Separate Estate of Husband**

- a. Husband's reimbursement claim against community estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- b. Husband's reimbursement claim against Wife's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- c. Community reimbursement claim against Husband's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- d. Wife's reimbursement claim against husband's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_

**B. Separate Estate of Wife**

- a. Wife's reimbursement claim against community estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- b. Wife's reimbursement claim against Husband's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- c. Community reimbursement claim against Wife's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_
- d. Husband's reimbursement claim against Wife's separate estate: \$ \_\_\_\_\_  
Value: \$ \_\_\_\_\_

**STATE OF TEXAS           §**  
  §  
**COUNTY OF DALLAS       §**

I, \_\_\_\_\_, of lawful age, state on oath that to the best of my knowledge and belief, the foregoing Inventory and Appraisal contains:

1. 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 myself 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 as mine 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.

I make this Affidavit with the following reservations or qualifications:

1. any omission from this Inventory is not intentional but is done through mere inadvertence and not for the purpose of misleading my spouse;

2. 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.

Further, I reserve the right to amend this Inventory before and during trial as additional information in acquired or appraisals or stipulations are made.

Signed on this \_\_\_\_ day of \_\_\_\_\_, 200\_.

\_\_\_\_\_  
\_\_\_\_\_

**Signed under oath before me, the undersigned authority, on this \_\_\_\_ day of \_\_\_\_\_, 200\_, by the said \_\_\_\_\_**

\_\_\_\_\_  
**NOTARY PUBLIC, State of Texas**

**CERTIFICATE OF SERVICE**

I certify that a true copy of the above was served on each attorney of record or party in accordance with the Texas Rules of Civil procedure on the \_\_\_\_ day of \_\_\_\_\_, 200\_.

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\_\_\_\_\_  
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\_\_\_\_\_  
**Thomas P. Finley, Jr.**