

ASSETS AND DEBTS QUESTIONNAIRE

DATE:

Some terms that will help you in answering this questionnaire.

Separate Property: Generally, assets are characterized as separate property if they were acquired before marriage or after the date of separation or they were acquired by gift or inheritance. Generally, debts incurred prior to marriage are separate property. However, debts incurred after separation but before the final judgment are the separate property of the spouse that incurred them unless the debts were incurred for the common necessities of life for either spouse or the children. Generally, the characterization of assets or debts as either separate or community property does not depend whose name is on the asset, account or credit card.

Community Property: Generally assets acquired during marriage (after the date of marriage and before the date of separation) are community property unless they were a gift or inheritance. This includes the value of a business built up during the marriage. Generally debts incurred during marriage are also community property debts. It doesn't matter if the debts (e.g. credit cards) were in joint names or held individually or were incurred by either party. If they were incurred during marriage they are community property debts. For example, a credit card may be in your name but if all the charges were incurred during marriage they are community property debts.

In the following questionnaire if you contend that an asset or a debt is separate property put "H" if it is the Husband's separate property or "W" if it is the Wife's. If you contend that the debts is partially community property and partially separate property write "W/CP" or H/CP."

SECTION ONE

ASSETS

REAL ESTATE (attach copies of deeds and latest mortgage statements)

a) PRINCIPAL RESIDENCE

Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

- (2) _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
- (3) _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
- (4) _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

k) Was the home refinanced yes no If yes, dates of refinance: _____

l) House payments during the marriage were made:
 _____ entirely from the wages of either spouse.
 _____ other, as follows: (include payments from separate property of either spouse):

m) Value of House at separation: \$ _____

n) Present value of house: \$ _____
 Describe Basis for this estimate:

o) Will residence be sold yes no If no, who will retain ownership? Husband Wife

OTHER REAL ESTATE (attach copies of deeds and latest mortgage statements)

b) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

	Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2)	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3)	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

c) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

d) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

e) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

f) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

g) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

h) Address: _____

Date of original purchase: _____

Purchase Price: \$ _____

Title is now in name of (e.g. H, W, Joint): _____

Amount of down payment: \$ _____

Describe where downpayment came from (e.g. joint savings, net proceeds from sale of prior house, separate property of either spouse, gift from third party):

Mortgages/Lines of Credit (Attach copies of latest statements)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

IF OTHER REAL ESTATE CONTINUE ON ATTACHMENT

TRANSFERS OF REAL ESTATE DURING MARRIAGE

During the marriage did either spouse transfer real estate to a third party or buy any real estate for a third party?

yes no

If yes, describe:

IDENTIFY ANY SPECIFIC ITEMS OF HOUSEHOLD FURNITURE, APPLIANCES THAT ARE VALUABLE

(attach copies of any receipts or valuations or insurance estimates. "Current Fair Market Value" refers to the price you would obtain through sale of the particular asset in the current market. Give your best estimate)

Description	Separate/Community Property	Date Purchased	Current Fair Market value	Amount Owed
a) _____	_____	_____	\$ _____	\$ _____
b) _____	_____	_____	\$ _____	\$ _____
c) _____	_____	_____	\$ _____	\$ _____
d) _____	_____	_____	\$ _____	\$ _____
e) _____	_____	_____	\$ _____	\$ _____
f) _____	_____	_____	\$ _____	\$ _____
g) _____	_____	_____	\$ _____	\$ _____
h) _____	_____	_____	\$ _____	\$ _____
i) _____	_____	_____	\$ _____	\$ _____
j) _____	_____	_____	\$ _____	\$ _____
k) _____	_____	_____	\$ _____	\$ _____
l) _____	_____	_____	\$ _____	\$ _____

IDENTIFY ANY SPECIFIC ITEMS OF JEWELERY, ANTIQUES, COIN COLLECTIONS ETC. THAT ARE VALUABLE

(attach copies of any receipts or valuations or insurance estimates):

Description	Separate/Community Property	Date Purchased	Current Fair Market value	Amount Owed
a) _____	_____	_____	\$ _____	\$ _____
b) _____	_____	_____	\$ _____	\$ _____
c) _____	_____	_____	\$ _____	\$ _____
d) _____	_____	_____	\$ _____	\$ _____
e) _____	_____	_____	\$ _____	\$ _____
f) _____	_____	_____	\$ _____	\$ _____
g) _____	_____	_____	\$ _____	\$ _____
h) _____	_____	_____	\$ _____	\$ _____

Attach a separate sheet if necessary.

AUTOMOBILES, BOATS, TRAILERS (attach copies of title or registration certificates)

If you lease the car list this as "other debts under section 24."

Make, year, model of car AND License plate	Separate/Community Property	Date Purchased	Current Fair Market value	Amount owed
a) _____	_____	_____	\$ _____	\$ _____
b) _____	_____	_____	\$ _____	\$ _____
c) _____	_____	_____	\$ _____	\$ _____
d) _____	_____	_____	\$ _____	\$ _____
e) _____	_____	_____	\$ _____	\$ _____
f) _____	_____	_____	\$ _____	\$ _____
g) _____	_____	_____	\$ _____	\$ _____
h) _____	_____	_____	\$ _____	\$ _____

CHECKING, SAVINGS, CREDIT UNION AND OTHER DEPOSIT ACCOUNT ACCOUNTS

(Attach copy of latest statements for each account)

a) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

b) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

c) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

d) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

e) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

f) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____

Balance at date of marriage: \$ _____

Balance of account at date of separation: \$ _____

Current balance of account: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

g) Bank: _____ Account No: _____

Checking Savings Credit Union CD Other

Whose name(s) is/are on the account: _____

Branch Address and telephone no: _____

Date when account was opened: _____
 Balance at date of marriage: \$ _____
 Balance of account at date of separation: \$ _____
 Current balance of account: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

CASH/SAFETY DEPOSIT BOXES/TAX REFUNDS

a) Amount: \$ _____
 Where located: _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

b) Amount: \$ _____
 Where located: _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

c) Amount: \$ _____
 Where located: _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

LIFE INSURANCE POLICIES ON EITHER SPOUSE OR CHILDREN
 (attach copy of declaration page of each policy)

a) Company: _____
 Agents Name, Address and Telephone no: _____

Date acquired: _____
 Name of Insured: _____
 Policy Owner: _____
 Primary Beneficiary: _____ Relationship to insured: _____
 Contingent Beneficiary: _____ Relationship to insured: _____
 Type of Policy: **(term/whole life/Universal Life/Variable):** _____
 Death Benefit: \$ _____
 Cash Surrender Value: \$ _____
 Annual Premium :\$ _____
 Loans against policy: \$ _____

b) Company: _____

Agent Name, Address and Telephone no: _____

Date acquired: _____

Name of Insured: _____

Policy Owner: _____

Primary Beneficiary: _____

Contingent Beneficiary: _____

Type of Policy: **(term/whole life):** _____

Face Amount: \$ _____

Cash Surrender Value: \$ _____

Loans against policy: \$ _____

Disability Insurance

a) Name of insured: _____ Insurance company: _____

Annual premium: \$ _____ Monthly benefit: \$ _____ COLA* benefit: yes no

Elimination period: 30 days 60 days 90 days 180 days 365 days

Benefit period: 2 years 5 years Age 65 Life Other: _____

b) Name of insured: _____ Insurance company: _____

Annual premium: \$ _____ Monthly benefit: \$ _____ COLA* benefit: yes no

Elimination period: 30 days 60 days 90 days 180 days 365 days

Benefit period: 2 years 5 years Age 65 Life Other: _____

Long Term Care Insurance

a) Name of insured: _____ Insurance company: _____

Annual premium: \$ _____ Monthly benefit: \$ _____ COLA* benefit: yes no

Elimination period: 30 days 60 days 90 days 180 days 365 days

Benefit period: 3 years 5 years Age 65 Life Other: _____

b) Name of insured: _____ Insurance company: _____

Annual premium: \$ _____ Monthly benefit: \$ _____ COLA* benefit: yes no

Elimination period: 30 days 60 days 90 days 180 days 365 days

Benefit period: 3 years 5 years Age 65 Life Other: _____

* Annual cost of living adjustment

Medical Insurance

a) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Type of plan: HMO PPO Other: _____

Names of dependents covered: _____

b) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Type of plan: HMO PPO Other: _____

Names of dependents covered: _____

Dental Insurance

a) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Names of dependents covered: _____

b) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Names of dependents covered: _____

Vision Coverage

a) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Names of dependents covered: _____

b) Name of insured: _____ Insurance company: _____

Employer sponsored Plan? yes no Monthly premium: \$ _____

Names of dependents covered: _____

Other

Type of coverage: _____

Name of insured: _____ Insurance company: _____

Monthly premium: \$ _____ Names of dependents covered: _____

Do you contribute to Flexible Spending Account through payroll deductions? yes no

If yes: Monthly contribution: \$ _____ Balance in account: \$ _____

Comments

List any other items to be considered or provide more information on any prior information:

STOCKS, BONDS, MUTUAL FUNDS, BROKERAGE ACCOUNTS

(attach most recent account statement/copy of certificates)

a) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____

Name and telephone no. _____

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse
 Yes No If yes, how much \$ _____

b) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

c) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

d) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

e) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

f) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____
 Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

g) Name of security/fund/account: _____

Shares Bonds Mutual Funds Brokerage account other

Account Number: _____ No. of securities, if applicable: _____

Broker/Manager: _____
Name and telephone no.

Date securities acquired/account opened: _____

Cost of securities/fund: \$ _____
 Value of securities/balance of fund at date of marriage: \$ _____
 Current value of securities/balance of fund: \$ _____

Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

ANNUITIES (attach statements. Do not include annuities that are part of an IRA or any other retirement plan)

Description or name of annuity: _____

Date acquired: _____ Cost: \$ _____ Current value: \$ _____

Do you receive income from the annuity? yes no If yes, is it lifetime income? yes no

Amount of monthly income: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of annuity: _____

Date acquired: _____ Cost: \$ _____ Current value: \$ _____

Do you receive income from the annuity? yes no If yes, is it lifetime income? yes no

Amount of monthly income: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of annuity: _____

Date acquired: _____ Cost: \$ _____ Current value: \$ _____

Do you receive income from the annuity? yes no If yes, is it lifetime income? yes no

Amount of monthly income: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of annuity: _____

Date acquired: _____ Cost: \$ _____ Current value: \$ _____

Do you receive income from the annuity? yes no If yes, is it lifetime income? yes no

Amount of monthly income: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of annuity: _____

Date acquired: _____ Cost: \$ _____ Current value: \$ _____

Do you receive income from the annuity? yes no If yes, is it lifetime income? yes no

Amount of monthly income: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

TRADITIONAL IRAS, ROTH IRAS, ROLLOVER IRAS

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No
If yes, how much \$ _____ Yours Spouse

Description or name of account: _____

Name on account Yours Spouse

Type: Traditional IRA Roth IRA Rollover IRA

Date of first contribution: _____

Balance at date of separation: \$ _____ Current balance: \$ _____

If IRA was inherited, from whom: _____ date: _____

Do you contend that any portion of this account is separate property? Yes No
If yes, how much \$ _____ Yours Spouse

Employer or Self Employed Retirement Plans (Qualified plans, such as 401(k), 403(b), SEP, Keogh, ESOP, Profit Sharing, Pension Plan) (attach copies of latest plan statements)

a) Name on account Yours Spouse
Describe plan type: _____ Account number: _____
Name of plan: _____
Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
Date of first contribution: _____ When do you expect to receive income: _____
Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
Current balance of the plan: \$ _____
If there is a loan balance on this account, what is the current amount: \$ _____
Do you contend that any portion of this account is separate property? Yes No
If yes, how much \$ _____ Yours Spouse

b) Name on account Yours Spouse
Describe plan type: _____ Account number: _____
Name of plan: _____
Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
Date of first contribution: _____ When do you expect to receive income: _____
Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
Current balance of the plan: \$ _____
If there is a loan balance on this account, what is the current amount: \$ _____
Do you contend that any portion of this account is separate property? Yes No
If yes, how much \$ _____ Yours Spouse

c) Name on account Yours Spouse

Describe plan type: _____ Account number: _____
 Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

d) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____
 Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

e) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____
 Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

f) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____

Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

g) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____
 Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

h) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____
 Name of plan: _____
 Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
 Date of first contribution: _____ When do you expect to receive income: _____
 Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____
 Current balance of the plan: \$ _____
 If there is a loan balance on this account, what is the current amount: \$ _____
 Do you contend that any portion of this account is separate property? Yes No
 If yes, how much \$ _____ Yours Spouse

i) Name on account Yours Spouse
 Describe plan type: _____ Account number: _____
 Name of plan: _____

Address, telephone number of account manager/employer: _____

Employment started: _____ Employment ended: _____
Date of first contribution: _____ When do you expect to receive income: _____
Annual Contribution: \$ _____ Employer Contribution: \$ _____

Balance at date of marriage: \$ _____ Balance at date of separation: \$ _____

Current balance of the plan: \$ _____

If there is a loan balance on this account, what is the current amount: \$ _____

Do you contend that any portion of this account is separate property? Yes No

If yes, how much \$ _____ Yours Spouse

DEFERRED COMPENSATION (Non-qualified plans, salary continuation, executive bonus plans)

Husband:

Description or name of plan: _____

Expected annual income: \$ _____ For _____ years. Begins at age: _____

Will payments continue after your death? yes no

If yes:

Expected annual income: \$ _____ For _____ years

To whom will income be paid: _____

Wife:

Description or name of plan: _____

Expected annual income: \$ _____ For _____ years. Begins at age: _____

Will payments continue after your death? yes no

If yes:

Expected annual income: \$ _____ For _____ years

To whom will income be paid: _____

Comments: _____

STOCK OPTIONS

a) Description/name of plan: _____

Type of plan: Incentive Stock Option (ISO) Employee Stock Purchase Non-qualified

Owner: Husband Wife

Date option granted: _____ Is option vested* yes no

Current price of stock: \$ _____ Exercise price: \$ _____ Expiration date: _____

Have you exercised option? yes no

If yes: Date exercised: _____ Amount paid: \$ _____

Comments: _____

b) Description/name of plan: _____
 Type of plan: Incentive Stock Option (ISO) Employee Stock Purchase Non-qualified
 Owner: Husband Wife
 Date option granted: _____ Is option vested* yes no
 Current price of stock: \$ _____ Exercise price: \$ _____ Expiration date: _____
 Have you exercised option? yes no
 If yes: Date exercised: _____ Amount paid: \$ _____
 Comments: _____

* Answer "yes" if you currently have the right to exercise the option with no restrictions. Answer "no" if your right to exercise is contingent upon the occurrence of a future event.

ACCOUNTS RECEIVABLE AND UNSECURED NOTES

(Attach copy of each)

Description	Separate/Community Property	Date Purchased	Current Fair Market value	Amount Owed
a) _____	_____	_____	\$ _____	\$ _____
b) _____	_____	_____	\$ _____	\$ _____
c) _____	_____	_____	\$ _____	\$ _____
d) _____	_____	_____	\$ _____	\$ _____

PARTNERSHIPS AND OTHER INTERESTS OF EITHER SPOUSE IN ANY BUSINESS, PROFESSIONAL (attach copy of most current K-1 forms and Schedule C tax returns)

a) Name and address of business: _____

Partnership Corporation Sole proprietor Other _____

You or spouse's Ownership interest: _____

Date business interest started/ acquired: _____

Estimated Current Fair Market Value of Business (if known): _____

b) Name and address of business: _____

Partnership Corporation Sole proprietor Other _____

You or spouse's Ownership interest: _____

Date business interest started/ acquired: _____

Estimated Current Fair Market Value of Business (if known): _____

OTHER ASSETS (e.g. frequent flyer points, season tickets, intellectual property such as copyrights or patents, timeshares)

Description	Separate Property	Community Property	Date Purchased Acquired	Current Fair Market value	Amount Owed
a) _____	_____	_____	_____	\$ _____	\$ _____
b) _____	_____	_____	_____	\$ _____	\$ _____
c) _____	_____	_____	_____	\$ _____	\$ _____
d) _____	_____	_____	_____	\$ _____	\$ _____
e) _____	_____	_____	_____	\$ _____	\$ _____
f) _____	_____	_____	_____	\$ _____	\$ _____
g) _____	_____	_____	_____	\$ _____	\$ _____

COMMENTS:

SECTION TWO

DEBTS

19. STUDENT LOANS

- a) In whose name: Yours Spouse
 Date Incurred: _____
 Total Amount Owning: _____
 Amount paid off during marriage: \$ _____
 Do you contend that this is a separate property debt? Yes No If yes, how much \$ _____
- b) In whose name: Yours Spouse
 Date Incurred: _____
 Total Amount Owning: _____
 Amount paid off during marriage: \$ _____
 Do you contend that this is a separate property debt? Yes No If yes, how much \$ _____
- c) In whose name: Yours Spouse
 Date Incurred: _____
 Total Amount Owning: _____
 Amount paid off during marriage: \$ _____
 Do you contend that this is a separate property debt? Yes No If yes, how much \$ _____

TAXES DUE

a) Date Incurred: _____
 Total Amount Owning: \$ _____
 Do you contend that this is a separate property debt? Yes No If yes, how much \$ _____

SUPPORT ARREARAGES (Attach copies of orders and statements)

a) Date Incurred: _____
 Total Amount Owning: \$ _____
 Do you contend that this is a separate property debt? Yes No If yes, how much \$ _____

OTHER DEBTS (Attach latest statements. Include all loans and other debts owed to others installment loans, personal loans, credit lines, brokerage margin account, tax liens and or any payment plans. **Do not include loans related to real estate, vehicles, aircraft, and boats that you have already listed**)

Lender's Name and Account Number	Date Incurred	Original Amount	Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(2) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
(3) _____		\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

CREDIT CARDS (attach copy of latest statement)

a) Credit card company: _____
 Account No.: _____
 Name on account: _____
 Current balance: \$ _____
 Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?
 Yes No

b) Credit card company: _____
 Account No.: _____
 Name on account: _____
 Current balance: \$ _____
 Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

c) Credit card company: _____
Account No.: _____
Name on account: _____
Current balance: \$ _____
Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

d) Credit card company: _____
Account No.: _____
Name on account: _____
Current balance: \$ _____
Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

e) Credit card company: _____
Account No.: _____
Name on account: _____
Current balance: \$ _____
Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

f) Credit card company: _____
Account No.: _____
Name on account: _____
Current balance: \$ _____
Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

h) Credit card company: _____
Account No.: _____
Name on account: _____
Current balance: \$ _____
Balance at date of separation: \$ _____

Was the balance at date of separation incurred wholly during marriage?

Yes No

Attach extra sheets if necessary

