ASSETS AND DEBTS QUESTIONAIRRE

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 necessaries 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

Lender's Name and

Account Number

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

Address: Date of original purchase: Purchase Price: Title is now in name of (e.g. II. 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)

Payments

Balance at

Balance at

Date of Marriage Date of Separation

Date Original Monthly

Incurred Amount

Current Balance

Law Offices of Warren R. Shiell					Assets and Debts	
(2)		S	\$	S	\$	\$
(3)		\$	\$	\$	\$	\$
(4)		\$	\$	\$	\$	\$
k) Was the home refinanced yes	s no	Ι	f yes, dates	of refinance:		
1) House payments during the mar entirely from the wages of either other, as follows: (include payments)	er spouse.		e property	of either spous	ee):	
m) Value of House at separation: \$n) Present value of house: \$Describe Basis for this estin						
o) Will residence be sold yes	no It	f no, who	will retain	ownership?	Husband	Wife
OTHER REAL ESTATE (att	ach copies	s of deeds a	and latest mo	ortgage statemen	ts)	
b) Address:						
Date of original purchase: Purchase Price: Title is now in name of (e.g. H. W. Amount of down payment: \$	Joint):	=		from sale of prior hot	ise, separate property of	either spouse, gift from
Mortgages/Lines of Credit (Attach e Lender's Name and Account Number	opies of la Date Incurred	Original	ents) Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)		S	\$	\$	\$	\$
e e e e e e e e e e e e e e e e e e e						
(2)		\$	\$	\$	\$	\$
<u></u>						
(3)		\$.	\$	\$.	\$	\$

c) Address:					· · · · · · · · · · · · · · · · · · ·
Date of original purchase: Purchase Price: Title is now in name of (e.g. H. W. J. Amount of down payment: \$	oint):		s from sale of prior ho	use, separate property o	f either spouse, gift from
Mortgages/Lines of Credit (Attach col Lender's Name and Account Number	pies of latest sta Date Original Incurred Amount	Monthly	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)	\$	\$	S	\$	\$
(2)	S	\$	S	\$	\$
(3)	\$, S	\$	\$	\$
Title is now in name of (e.g. II, W. J			s from sale of prior ho	use. separate property o	f either spouse, gift from
Mortgages/Lines of Credit (Attach con Lender's Name and Account Number	Dies of latest star Date Original Incurred Amount	Monthly	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)	\$	s	\$	\$	\$
(2)	S	S	\$	\$	\$
(3)	S	S	\$	S	\$

g) Address:

Date of original purchase:

Purchase Price: \$		_				
Title is now in name of (e.g. H. W. J Amount of down payment: \$	oint): _					
Describe where downpayment came third party):	from (e	g, joint savin	gs, net proceeds	from sale of prior hou	ise, separate property of	either spouse, gift from
Mortgages/Lines of Credit (Attach co	pies of la Date Incurred	Original	ents) Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)		\$	\$	S	\$	\$
(2)		S	\$	\$	\$	\$
(3)		S	S	S	\$	\$
h) Address:						
Date of original purchase: Purchase Price: Title is now in name of (e.g. H, W, J Amount of down payment: \$ Describe where downpayment came third party):	oint):	– g. joint saving		from sale of prior hou	ise, separate property of	either spouse, gift from
Mortgages/Lines of Credit (Attach co Lender's Name and Account Number	pies of la Date Incurred	Original	ents) Monthly Payments	Balance at Date of Marriage	Balance at Date of Separation	Current Balance
(1)		\$, , ,	\$.	S	\$	\$
(2)		\$	\$	S	\$	\$
(3)			S	\$	\$	\$

IF OTHER REAL ESTATE CONTINUE ON ATTACHMENT

TRANSFERS OF REAL ESTATE DURING MARRIAGE

D	uring the	marriage	did eithe	er spouse	transfer	real	estate	to a	third	party	or	buy	any	real	estate	for a	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) ,				\$	\$
1)				\$	\$

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, ye License j	ar, model of car AND plate	Separate Community Property	Date Purchased	Current Fair Market value	Amount owed
a)				\$	\$
b)				\$	\$
c)				\$	\$
d)				\$,	\$
e)				\$	\$
ſ)				\$	\$
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 Whose name(s) is/are on the a Branch Address and telephone	ecount:							
	Date when account was opene Balance at date of marriage: Balance of account at date of s Current balance of account: Do you contend that any portion If yes, how much \$	separation: \$ son of this account is se	parate property?	Yes No					
b)	Bank:	Account No	o:						
	Checking Savings Whose name(s) is/are on the a Branch Address and telephone	ecount:							
	Date when account was opene Balance at date of marriage: Balance of account at date of s Current balance of account: Do you contend that any portion If yes, how much \$	separation: separation: s on of this account is se	parate property?	YesNo					
e)	Bank:	Account No	o:						
-,	Checking Savings Whose name(s) is/are on the a Branch Address and telephone	ccount:	CD .						
	Date when account was opene Balance at date of marriage: Balance of account at date of s Current balance of account: Do you contend that any portion of the second is the second in the	separation: \$ son of this account is se	parate property?	Yes L. No					
d)	Bank:	Account No	D:						

	Checking Savings Credit Union CD Other Whose name(s) is/are on the account: Branch Address and telephone no:								
	Balance at da Balance of ac Current balar Do you conte	ecount was opened to of marriage: ecount at date of ecount: end that any portionals.	separation: \$ son of this account is se	parate property	y? ∵Yes ⊟ No				
e)	Bank:		Account No	0:					
	Whose name	(s) is/are on the a	Credit Union ecount:						
	Balance at da Balance of ac Current balar Do you conte	nd that any porti	separation: separation: space on of this account is se Yours Spouse	parate property	y? Yes No				
f)	Bank:		Account No	o:					
	Whose name		Credit Union ecount:						
	Do you come	nd that any porti	d: separation: \$ on of this account is se Yours Spouse	parate property	√? ∷ Yes ∷ No				
g)	Bank:		Account No):	<u></u>				
	Whose name	(s) is/are on the a	Credit Union ecount:						

	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:	\$		
	Current balance of account:	\$		
	Do you contend that any portion of this acc	ount is senarate property?	Ves No	
	If yes, how much \$ Yours		. 105 : 110	
	CH/CAFETY DEDOCUT DOVEC/TAX	y neguning		
CA	SH/SAFETY DEPOSIT BOXES/TAX	X REFUNDS		
a)	Amount: \$ Where located: Do you contend that any portion of this acc	count is senarate property?	Yes No	
	If yes, how much \$ Yours		100 . 110	
b)	Amount: \$ Where located:			
	Do you contend that any portion of this acc If yes, how much \$ Yours		Yes No	
c)	Amount: \$ Where located:			
	Do you contend that any portion of this acc If yes, how much \$ Yours		Yes No	
LIF	E INSURANCE POLICIES ON EIT	HER SPOUSE OR CH	IILDREN	
	(attach copy of declaration page of each policy)			
a) (Company:			
Agei	nts Name, Address and Telephone no:			
	acquired:			
	e of Insured:	-		
Polic	cy Owner:	Calatianulin ta ingganadi		
Cont	ary Beneficiary: R ingent Beneficiary: R	elationship to insured:		
Type	e of Policy: (term/whole life/Universal Life/	Variable):		
Deat	h Benefit: \$	/ 		
Cash	Surrender Value: \$			
Annı	ual Premium :\$			
Loan	s against policy: \$			

Type of plan: □ HMO □ PPO □ Other:

) Name of sect	irity/fund/acco	unt:		
Shares	Bonds	Mutual Funds	Brokerage account	other
Account Nun	nber:	No. of secu	rities, if applicable:	
Broker/Mana	ger:			

Name and telephone no.

Current value onten Do you conten If yes, how mu	ies/fund: ties/balance of of securities/bad that any por ch \$	f fund at date of marriage:	\$	No
b) Name of securi	ty/fund/accou	nt:		
Shares	Bonds	Mutual Funds	Brokerage account	other
Account Numb	er:	No. of securities	s, if applicable:	
Broker/Manage	er:			
		Name and telephone no.		
Do you contend If yes, how	es/fund: ties/balance of of securities/bal that any port v much \$	f fund at date of marriage: dance of fund: ion of this account is sepai Yours Spou	rate property? Yes ise	No
c) Name of securi	ty/fund/accou	nt:		
Shares	Bonds	Mutual Funds	Brokerage account	other
Account Numb	er:	No. of securities	. if applicable:	
Broker/Manage	er:	Name and telephone no.		
Do you comen	a mai any pori	unt opened: f fund at date of marriage: lance of fund: ion of this account is separ Yours Spouse	\$ \$ \$ rate property? Yes	No
d) Name of securi	ty/fund/accou	nt:		
Shares	Bonds	Mutual Funds	Brokerage account	other
Account Numb	er:	No. of securities	. if applicable:	
Broker/Manage	er:	Name and telephone no.		

Current value of securities	of fund at date of marriage: balance of fund: ortion of this account is separ	\$	No
e) Name of security/fund/acco	ount:		
Shares Bonds	Mutual Funds	Brokerage account	other
Account Number:	No. of securities	, if applicable:	
Broker/Manager:	Name and telephone no.		
Date securities acquired/ac Cost of securities/fund: Value of securities/balance Current value of securities/ Do you contend that any portion of the security of the securities of the	of fund at date of marriage: balance of fund: ortion of this account is separ Yours Spouse	rate property? Yes	No
Shares Bonds	Mutual Funds No. of securities	Brokerage account	
	Name and telephone no.		
Current value of securities/	of fund at date of marriage: balance of fund: ortion of this account is separ	\$	No
g) Name of security/fund/acco	ount:		
Shares Bonds	Mutual Funds	Brokerage account	other
Account Number:	No. of securities	. if applicable:	
Broker/Manager:	Name and telephone no.		
Date securities acquired/ac			

Cost of securities/fund: \$ Value of securities/balance of fund at date of marriage: \$ Current value of securities/balance of fund: \$
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? \square yes \square no If yes, is it lifetime income? \square yes \square 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? \square yes \square no If yes, is it lifetime income? \square yes \square 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? \square yes \square no If yes, is it lifetime income? \square yes \square 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? \square yes \square no If yes, is it lifetime income? \square yes \square 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? \square yes \square no If yes, is it lifetime income? \square yes \square 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 on non-sef-second
Description or name of account: Name on account Yours Spouse

Data of fourt and ileation	· IRA		
Date of first contribution:			
Date of first contribution: Balance at date of separation: \$ If IP A was inharited, from whom:	Current balance: \$		
If IRA was inherited, from whom:	date:		·
Do you contend that any portion of this account If yes, how much \$ Yours	is separate property?	Yes	No
Description or name of account:			
Name on account Yours Spouse			
Type: ¬Traditional IRA ¬ Roth IRA ¬ Rollover	·IRA		
Date of first contribution:			
Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom:	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		. 100	
Description or name of account:			
Name on account Yours Spouse			
Type: □Traditional IRA □ Roth IRA □ Rollover	· IR A		
Date of first contribution:	114. 1		
Balance at date of separation: \$	Current balance: \$		
Balance at date of separation: \$	dote:		
Do you contend that any portion of this account	is senarate property?	Ves	No
If yes, how much \$ Yours		103	140
Description or name of account:			
Description of name of account.			
Name on account Voure Spouse			
Name on account yours Spouse			
Type: Traditional IRA Roth IRA Rollover	IRA		
Type: Traditional IRA Roth IRA Rollover	IRA		
Type: Date of first contribution: Balance at date of separation: \$\(\)	IRA Current balance: \$		
Type: Traditional IRA Roth IRA Rollover Date of first contribution: Balance at date of separation: If IRA was inherited, from whom:	IRA Current balance: \$ date:		
Type: Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account	Current balance: \$ date: is separate property?		
Type: Traditional IRA Roth IRA Rollover Date of first contribution: Balance at date of separation: If IRA was inherited, from whom:	Current balance: \$ date: is separate property?		
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Yours	Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: □ Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Yours Description or name of account: Name on account Yours Spouse	Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover	Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover	Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Yours Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Yours Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Vours Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property?	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Yours Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property?	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$ Vours Description or name of account: Name on account Yours Spouse Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No
Type: □Traditional IRA □ Roth IRA □ Rollover Date of first contribution: Balance at date of separation: \$ If IRA was inherited, from whom: Do you contend that any portion of this account If yes, how much \$	Current balance: \$ date: is separate property? Spouse IRA Current balance: \$ date: is separate property? Spouse	Yes	No

	ontend that any pohow much \$				operty?	Yes	No	
Name on Type: □Ti	on or name of accaccount — Your raditional IRA —	s Spou Roth IRA □ F	ise Rollover					
Date of fire Balance a	rst contribution: t date of separation	on: \$		Current bala	ince: \$			
If IRA wa	s inherited, from ontend that any pe	whom:			date:			
Do you co If yes,	ntend that any pendominant how much \$	ortion of this Y	account ours	is separate pro Spouse	operty?	Yes	No	
	er or Self Em p SOP, Profit Shari				-			403(b), SEP, Keogh
Descri	on account Yo ibe plan type: of plan:		· · · ·-	Accou	nt numbe	r:		
	ss, telephone nur	nber of accou	nt mana	ger/employer:		18 mar # - 20 cm N m 1880 N cm		
Date c	oyment started: of first contribution al Contribution: \$	on:		Employmen	it ended: ou expect	to recei	ve income:	
Currei If ther Do yo	ce at date of marint balance of the e is a loan balance u contend that an how much \$	plan: \$ se on this acco sy portion of t	ount, wh	at is the currer unt is separate	nt amount	t:\$		
Descri Name	on account You he plan type: of plan:			Accou				
Addic	ss, terephone har							
Emplo Date o Annua	oyment started:	on:		Employmen When do yo Employer C	it ended: _ ou expect Contributi	to receivon: \$	ve income:	
Currei If ther Do yo	ce at date of marr nt balance of the e is a loan balanc u contend that an	plan: \$ e on this acco y portion of t	ount, wh	- at is the currer unt is separate	nt amount	.:\$		
	how much \$on account Yo							

	Describe plan type:	Account number:					
	Name of plan:						
		manager/employer:					
	Employment started:	Employment ended: When do you expect to receive income:					
	Date of first contribution:	When do you expect to receive income:					
	Annual Contribution: \$	Employer Contribution: \$					
	Balance at date of marriage: \$ Current balance of the plan: \$	Balance at date of separation: \$					
	If there is a loan balance on this accoun	t. what is the current amount:\$					
		account is separate property? Yes No					
	If yes, how much \$ You						
d)	Name on account Yours Sp	pouse					
	Describe plan type:	Account number:					
	Name of plan:						
	Address, telephone number of account i	nanager/employer:					
	Employment started:	Employment ended:					
	Date of first contribution:	Employment ended: When do you expect to receive income:					
	Annual Contribution: \$	Employer Contribution: \$					
	Current balance of the plan: \$	Balance at date of separation: \$					
	If there is a loan balance on this accoun						
		account is separate property? Yes No					
	If yes, how much \$You	irs Spouse					
e)	Name on account Yours Sr	oouse					
		Account number:					
	Name of plan:						
		manager/employer:					
	Employment started:	Employment ended: When do you expect to receive income:					
	Date of first contribution:	When do you expect to receive income:					
	Annual Contribution: \$	Employer Contribution: \$					
	Balance at date of marriage: \$ Current balance of the plan: \$	Balance at date of separation: \$					
	If there is a loan balance on this account	If there is a loan balance on this account, what is the current amount:\$					
		account is separate property? Yes No					
	If yes, how much \$ You						
f)	Name on account Yours Sp	ouse					
ı <i>j</i>	Describe plan type:						

	Name of plan: Address, telephone number of account manager/employer:					
	Employment started:					
	Date of first contribution:	When do you expect to receive income:				
	Annual Contribution: \$	Employment ended: When do you expect to receive income: Employer Contribution: \$				
	Current balance of the plan: \$	Balance at date of separation: \$ccount, what is the current amount:\$				
		of this account is separate property? Yes No				
g)	Name on account Yours					
	Describe plan type:	Account number:				
	Name of plan:	count manager/employer:				
		ount 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: \$				
	If there is a loan balance on this ac	ecount, what is the current amount:\$ of this account is separate property? Yes No				
1)	Name on account Yours Describe plan type:	Account number:				
	Name of plan: Address, telephone number of account manager/employer:					
	Date of first contribution:	Employment ended: When do you expect to receive income:				
	Annual Contribution: \$	Employer Contribution: \$				
	Balance at date of marriage: \$ Current balance of the plan: \$	Balance at date of separation: \$				
		count, what is the current amount:\$				
	If yes, how much \$	of this account is separate property? Yes No Yours Spouse				
i)	Name on account Yours					
	Describe plan type:Name of plan:	Account number:				

Address, telephone number of	account manager/employer:
Employment started:	Employment ended: When do you expect to receive income: Employer Contribution: \$
Date of first contribution:	When do you expect to receive income:
Annual Contribution: \$	Employer Contribution: \$
Balance at date of marriage: \$ Current balance of the plan: \$	Balance at date of separation: \$
If there is a loan balance on thi	s account, what is the current amount:\$
	on of this account is separate property? Yes No
If yes, how much \$	Yours Spouse
	$\Gamma { m ION}$ (Non-qualified plans, salary continuation, executive bonus plan
Husband:	
Description or name of plan:	For years. Begins at age:
Will payments continue after your	double rove cano
f yes:	death yes i no
Expected annual income: \$	For years
To whom will income be paid:	years
The second secon	
Wife:	
Description or name of plan:	Foryears. Begins at age:
expected annual income: \$	For years. Begins at age:
win payments continue after your	death? □ yes □ no
f yes:	For Pages
Expected annual income: \$	roiyears
Comments:	
STOCK OPTIONS	
\ D : :: / C 1	
) Description/name of plan:	ption (ISO) Employee Stock Purchase Non-qualified
'ype of plan: ☐ Incentive Stock Op	, , , , , , , , , , , , , , , , , , , ,
ype of plan: □ Incentive Stock Op Dwner: □ Husband □ Wife	
ype of plan: □ Incentive Stock Op Dwner: □ Husband □ Wife	
Type of plan: Incentive Stock Op Dwner: Itusband Wife Date option granted: Turrent price of stock: The stock of the stock is the	s option vested* yes no Exercise price: \$ Expiration date:
ype of plan: □ Incentive Stock Op Dwner: □ Husband □ Wife	s option vested* \(\pi \) yes \(\pi \) no Exercise price: \(\begin{align*} & & & & & & & & & & & & & & & & & & &

b) Description/nar Type of plan: □ Ir	me of plan: ncentive Stock Option	n (ISO) 🗆 Employee S	Stock Purchas	se 🗆 Non-qual	ified
Owner: Husban Date option grante Current price of st Have you exercise If yes: Date exerc		otion vested* yes tercise price: \$ nount paid: \$	no Expirati	on date:	
	you currently have t to exercise is conting				s. Answer
ACCOUNTS R (Attach copy of each)	RECEIVABLE A	ND UNSECURE	D NOTES		
Description		Separate/Community Property	Date Purchased	Current Fair Market value	Amount Owed
a)				\$	\$
b)				\$	\$
c)					\$
d) _				\$	\$
BUSINESS, PI	IPS AND OTHE ROFESSIONAL ress of business:	(attach copy of most cu	rrent K-1 form	s and Schedule	
Partnership	Corporation	Sole proprietor	Other		
Date business inte	wnership interest: rest started/ acquired . Fair Market Value c	•			
	ress of business:				
	Corporation				A SANTE MARKET
Date business inte	wnership interest: rest started/ acquired Fair Market Value o				

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

De	escription	Separate Community Property	Date Purchased Acquired	Current Fair Market value	Amount Owed	
a)				S	\$	
b)				\$	\$	
				\$	\$	
d)				\$	\$	
e)				\$	\$	
f)				\$	\$	
g)				\$	\$	
COMI	MENTS:					
				·		
SEC	CTION TWO					
SEC	HONTWO					
DEE	BTS					
19.	STUDENT LOANS					
a)		Spouse				
/	Date Incurred:	·				
	Total Amount Owing: Amount paid off during marriage: Do you contend that this is a separa					
	Amount paid off during marriage: \$					
	Do you contend that this is a separa	te property debt?	Yes N	o If yes, how	/ much \$	***************************************
b)	In whose name: Yours	Spouse				
	Date Incurred:					
	Total Amount Owing:					
	Total Amount Owing: Amount paid off during marriage: \$ Do you contend that this is a separa					
	Do you contend that this is a separa	te property debt?	Yes N	o If yes, how	/ much \$	
c)	In whose name: Yours	Spouse				
	Date Incurred: Total Amount Owing: Amount paid off during marriage: \$		×			
	Amount paid off during marriage: \$)				
	Do you contend that this is a separa	te property debt?	Yes N	o If yes, how	much \$	

TAXES DUE

a)		(t)					
	Total Amount Owing: Do you contend that the	ν is is a separat	— e proper	ty debt?	Yes No If	yes, how much	\$
St	JPPORT ARREARAG	SES (Attach co	opies of o	ders and sta	itements)		
a)	Date Incurred: Total Amount Owing: \$ Do you contend that this is		operty d	ebt? Yes	s No If yes	. how much \$_	
loai	THER DEBTS (Attach lands, credit lines, brokerage margin licles, aircraft, and boats that you	account, tax lier	is and or a	II loans and o my payment p	ther debts owed to plans. Do not incl	o others installment ude loans related	loans, personal
	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)			S	\$	\$	\$	\$
(2)			\$	S	\$	\$	\$
(3)			S	\$	\$	\$	\$
CF	REDIT CARDS (attach c	opy of latest sta	tement)				
	Credit card company: Account No.: Name on account: Current balance: Balance at date of separation	5on: \$					
	Was the balance at date of Yes No	separation inc	curred <u>w</u>	holly durin	g marriage?		
b)	Account No.: Name on account:						
	Current balance:	S					

	Was the balance at date of Yes! No	separation incurred <u>wholly</u> during marriage?
c)	Credit card company: Account No.: Name on account: Current balance: Balance at date of separati	\$
	Was the balance at date of Yes No	separation incurred wholly during marriage?
d)	A ANT	\$ on: \$
	Was the balance at date of Yes: No	`separation incurred <u>wholly</u> during marriage?
e)	Credit eard company: Account No.: Name on account: Current balance: Balance at date of separati	
	Was the balance at date of Yes No	`separation incurred wholly during marriage?
f)	Name on account:	\$on: \$
	Was the balance at date of Yes No	separation incurred wholly during marriage?
h)	Credit card company: Account No.: Name on account: Current balance: Balance at date of separati	\$on: \$
	Was the balance at date of Yes No	separation incurred wholly during marriage?

Attach extra sheets if necessary