

Client Name: _____

CLIENT QUESTIONNAIRE - MARITAL PROPERTY

1. Answer all questions completely. If you need more space, please use additional paper and attach it to this questionnaire.

2. If a particular question does not apply, enter "n/a".

3. **CONFIDENTIALITY:** The information you enter in this questionnaire is confidential and protected by Attorney-Client Privilege. The information will not be disclosed to anyone outside of this office, except in the course of rendering legal services on your behalf or as otherwise provided by law.

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. Street address: _____

County of location: _____

Description of improvements, if any: _____

Legal description: _____

Current fair market value (as of _____):

\$ _____

Name of mortgage company and account number, if any: _____

Current balance of mortgage (as of _____):

\$ _____

Other liens against property: _____

Current net equity in property: \$ _____

1.2. Street address: _____

County of location: _____

Description of improvements, if any: _____

Legal description: _____

Current fair market value (as of _____):

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\$ _____
Name of mortgage company and account number, if any: _____

Current balance of mortgage (as of _____):
\$ _____
Other liens against property: _____

Current net equity in property: \$ _____

1.3. Street address: _____
County of location: _____
Description of improvements, if any: _____

Legal description: _____

Current fair market value (as of _____):
\$ _____
Name of mortgage company and account number, if any: _____

Current balance of mortgage (as of _____):
\$ _____
Other liens against property: _____

Current net equity in 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. Name of mineral interest/lease/well: _____

Type of interest: _____
County of location: _____
Legal description: _____
Name of producer/operator: _____
Current value (as of _____):
\$ _____

2.2. Name of mineral interest/lease/well: _____

Type of interest: _____
County of location: _____
Legal description: _____

Name of producer/operator: _____
Current value (as of _____):
\$ _____

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/Mutual Fund Accounts

4.1. Name of brokerage firm/mutual fund: _____
Address of brokerage firm/mutual fund: _____
Name account held in: _____
Name of account (and subaccounts if any): _____
Account number (and numbers of subaccounts if any): _____
Margin loan balance (as of _____):
Value of community interest in each account (and subaccounts if any) (as of ____):

4.2. Name of brokerage firm/mutual fund: _____
Address of brokerage firm/mutual fund: _____
Name account held in: _____
Name of account (and subaccounts if any): _____
Account number (and numbers of subaccounts if any): _____
Margin loan balance (as of _____):
Value of community interest in each account (and subaccounts if any) (as of ____):

4.3. Name of brokerage firm/mutual fund: _____
Address of brokerage firm/mutual fund: _____
Name account held in: _____
Name of account (and subaccounts if any): _____
Account number (and numbers of subaccounts if any): _____

Margin loan balance (as of _____):

Value of community interest in each account (and subaccounts if any) (as of ____):

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

5.1. Name of security: _____
Number of shares: _____
Type of security: [common stock/preferred stock/bond/other security]: _____
Certificate numbers: _____
In possession of: _____
Name of exchange on which listed: _____
Pledged as collateral? [Yes/No] _____
Current market value (as of _____):
\$ _____
Value of community interest(as of _____):
\$ _____

5.2. Name of security: _____
Number of shares: _____
Type of security: [common stock/preferred stock/bond/other security]: _____
Certificate numbers: _____
In possession of: _____
Name of exchange on which listed: _____
Pledged as collateral? [Yes/No] _____
Current market value (as of _____):
\$ _____
Value of community interest(as of _____):
\$ _____

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

6.1. Name of company: _____
Date of option/grant: _____
Vesting schedule: _____
Number of options: _____
Are the options exercisable? [Yes/No] _____
Are the options registered? [Yes/No] _____
Current stock price: \$ _____
Strike price: \$ _____

Current net market value (as of _____):
\$ _____
Value of community interest (as of _____):
\$ _____

6.2. Name of company: _____
Date of option/grant: _____
Vesting schedule: _____
Number of options: _____
Are the options exercisable? [Yes/No] _____
Are the options registered? [Yes/No] _____
Current stock price: \$ _____
Strike price: \$ _____
Current net market value (as of _____):
\$ _____
Value of community interest (as of _____):
\$ _____

7. Bonuses

7.1. Name of company: _____
Date bonus expected to be paid: _____
Anticipated amount of bonus: \$ _____

7.2. Name of company: _____
Date bonus expected to be paid: _____
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. Name of business: _____
Address: _____
Type of business organization: _____
Percentage of ownership: _____
Number of shares owned (if applicable): _____
Value (as of _____):
\$ _____
Balance of accounts receivable if on cash accounting basis: \$ _____
Balance of liabilities if on cash accounting basis:
<\$ _____>

9. Retirement Benefits

9.A. *Defined Contribution Plans* (a plan that provides for an individual account for a participant and for benefits based solely on the amount contributed to the participant's account; IRC §§ 401(k), 403(b))

9.A.1. Exact name of plan: _____
Name and address of plan administrator: _____
Employee: _____
Employer: _____
Starting date of creditable service: _____
Percentage employee is vested: _____
Account name: _____
Account number: _____
Account balance as of date of marriage: \$ _____
Payee of survivor benefits: _____
Designated beneficiary: _____
Current account balance (as of _____):
\$ _____
Balance of loan against plan: \$ _____
Value of community interest in plan (as of _____):
\$ _____

9.A.2. Exact name of plan: _____
Name and address of plan administrator: _____
Employee: _____
Employer: _____
Starting date of creditable service: _____
Percentage employee is vested: _____
Account name: _____
Account number: _____
Account balance as of date of marriage: \$ _____
Payee of survivor benefits: _____
Designated beneficiary: _____
Current account balance (as of _____):
\$ _____
Balance of loan against plan: \$ _____
Value of community interest in plan (as of _____):
\$ _____

9.B. *Defined Benefit Plan* (any plan that is not a defined contribution plan and that usually involves payment of benefits according to a formula)

9.B.1. Exact name of plan: _____
Name and address of plan administrator: _____
Employee: _____
Employer: _____
Starting date of creditable service: _____
Percentage employee is vested: _____
Designated beneficiary: _____
Payee of survivor benefits: _____
Description of benefits: _____
Value of community interest in plan (as of _____):
\$ _____

9.B.2. Exact name of plan: _____
Name and address of plan administrator: _____
Employee: _____
Employer: _____
Starting date of creditable service: _____
Percentage employee is vested: _____
Designated beneficiary: _____
Payee of survivor benefits: _____
Description of benefits: _____
Value of community interest in plan (as of _____):
\$ _____

9.C. *IRA/SEP*

9.C.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.C.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 _____):
\$ _____

9.D. *Military Benefits*

9.D.1. Branch of service: _____
Name of service member: _____
Rank/pay grade of service member: _____
Starting date of creditable service: _____
Status of service member: [active/reserve/retired]
Payee of survivor benefits: _____
Description of benefits: _____
Monthly benefit payable: \$ _____
Value of community interest in plan (as of _____):
\$ _____
Percentage of plan that is community: _____%

9.D.2. Branch of service: _____
Name of service member: _____
Rank/pay grade of service member: _____
Starting date of creditable service: _____
Status of service member: [active/reserve/retired]
Payee of survivor benefits: _____
Description of benefits: _____
Monthly benefit payable: \$ _____
Value of community interest in plan (as of _____):
\$ _____
Percentage of plan that is community: _____%

9.E. *Nonqualified Plans*

9.E.1. Name of financial institution: _____
Account name: _____
Account number: _____
Account balance as of date of marriage: \$ _____
Payee of survivor benefits: _____
Designated beneficiary: _____
Value of community interest in plan (as of _____):
\$ _____

9.E.2. Name of financial institution: _____
Account name: _____
Account number: _____

Account balance as of date of marriage: \$ _____
 Payee of survivor benefits: _____
 Designated beneficiary: _____
 Value of community interest in plan (as of _____):
 \$ _____

9.F. *Government Benefits* (civil service, teacher, railroad, state and local)

9.F.1. Name of plan: _____
 Account name: _____
 Account number: _____
 Account balance as of date of marriage: \$ _____
 Payee of survivor benefits: _____
 Designated beneficiary: _____
 Value of community interest in plan (as of _____):
 \$ _____

9.F.2. Name of plan: _____
 Account name: _____
 Account number: _____
 Account balance as of date of marriage: _____
 Payee of survivor benefits: _____
 Designated beneficiary: _____
 Value of community interest in plan (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. Insurance and Annuities

11.A. Life Insurance

11.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: \$ _____

11.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: \$ _____

11.B. Annuities

11.B.1. Name of company: _____
Policy number: _____
Name of annuitant: _____
Name of owner: _____
Type of annuity: _____
Amount of premiums [monthly/quarterly/semiannually]: \$ _____
Date of issue: _____
Face amount: _____
Designated beneficiary: _____

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Value on date of marriage: _____
Current value (as of _____):
\$ _____
Balance of loan against policy: \$ _____
Value of community interest (as of _____):
\$ _____

11.B.2. Name of company: _____
Policy number: _____
Name of annuitant: _____
Name of owner: _____
Type of annuity: _____
Amount of premiums [monthly/quarterly/semiannually]: \$ _____
Date of issue: _____
Face amount: _____
Designated beneficiary: _____
Value on date of marriage: _____
Current value (as of _____):
\$ _____
Balance of loan against policy: \$ _____
Value of community interest (as of _____):
\$ _____

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

12.1. Year: _____
Make: _____
Model: _____
Name on certificate of title: _____
In possession of: _____
Vehicle identification number: _____
Name of creditor if loan against vehicle: _____
Current balance (as of _____):
\$ _____
Current net equity in vehicle: \$ _____

12.2. Year: _____
Make: _____
Model: _____
Name on certificate of title: _____
In possession of: _____

Vehicle identification number: _____
Name of creditor if loan against vehicle: _____
Current balance (as of _____):
\$ _____
Current net equity in vehicle: \$ _____

12.3. Year: _____
Make: _____
Model: _____
Name on certificate of title: _____
In possession of: _____
Vehicle identification number: _____
Name of creditor if loan against vehicle: _____
Current balance (as of _____):
\$ _____
Current net equity in vehicle: \$ _____

12.4. Year: _____
Make: _____
Model: _____
Name on certificate of title: _____
In possession of: _____
Vehicle identification number: _____
Name of creditor if loan against vehicle: _____
Current balance (as of _____):
\$ _____
Current net equity in vehicle: \$ _____

13. 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)

13.1. 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 _____):
\$ _____

13.2. 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 _____):

\$ _____

14. Household Furniture, Furnishings, and Fixtures

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

15. Electronics and Computers

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

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

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

Description of Asset	Value

17. Miscellaneous Sporting Goods and Firearms

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. Jewelry and Other Personal Items

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

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. Club Memberships

20.1. Name of club: _____
Name membership held in: _____
Account number: _____
Current value (as of _____): _____
Method of valuation: _____

20.2. Name of club: _____
Name membership held in: _____
Account number: _____
Current value (as of _____): _____
\$ _____
Method of valuation: _____

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

21.1. Name of airline: _____
Account number: _____
Current number of miles (as of _____): _____
Current value (if any): \$ _____

21.2. Name of airline: _____
 Account number: _____
 Current number of miles (as of _____):

 Value (if any): \$ _____

22. 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)

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

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

Description of Asset	Value
_____	_____
_____	_____
_____	_____

23. Safe-Deposit Boxes

23.1. Name of financial institution or other depository:

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

23.2. Name of financial institution or other depository:

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

23.3. Name of financial institution or other depository:

Box number: _____

Names of persons with access to contents: _____

Items in safe-deposit box: _____

24. Storage Facilities

24.1. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

24.2. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

24.3. Name and location: _____

Unit number: _____

Terms and length of lease: _____

Names of persons with access to contents: _____

Items in storage unit: _____

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

25.1. Nature of claim: _____
Amount of claim: \$ _____

25.2. Nature of claim: _____
Amount of claim: \$ _____

26. Community Liabilities

26.A. Credit Cards and Charge Accounts (attach separate sheet if necessary)

26.A.1. Name of creditor: _____
Account number: _____
Name(s) on account: _____
Current balance (as of _____):
<\$ _____>
Balance as of _____ [date of separation]:
<\$ _____>

26.A.2. Name of creditor: _____
Account number: _____
Name(s) on account: _____
Current balance (as of _____):
<\$ _____>
Balance as of _____ [date of separation]:
<\$ _____>

26.A.3. Name of creditor: _____
Account number: _____
Name(s) on account: _____
Current balance (as of _____):
<\$ _____>
Balance as of _____ [date of separation]:
<\$ _____>

26.A.4. Name of creditor: _____
Account number: _____
Name(s) on account: _____
Current balance (as of _____):
<\$ _____>
Balance as of _____ [date of separation]:

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<\$ _____>

26.A.5. Name of creditor: _____

Account number: _____

Name(s) on account: _____

Current balance (as of _____):

<\$ _____>

Balance as of _____ [date of separation]:

<\$ _____>

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

26.B.1. Amount owed in any previous tax year:

<\$ _____>

[describe liability, e.g., federal income tax/property taxes]

Amount owed for current year _____:

<\$ _____>

26.B.1. Amount owed in any previous tax year:

<\$ _____>

[describe liability, e.g., federal income tax/property taxes]

Amount owed for current year _____:

<\$ _____>

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

26.C.1. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing? [Yes/No]

Current balance (as of _____):

<\$ _____>

Security, if any: _____

26.C.2. Name of creditor: _____

Account number: _____

Party incurring liability: _____

Is loan evidenced in writing? [Yes/No]

Current balance (as of _____):

<\$ _____>

Security, if any: _____

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

26.D. *Pledges* (include charitable, church and school related)

26.F.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: _____

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

26.E.1. Name of creditor: _____
Name of person primarily liable: _____
Amount of contingent liability: <\$ _____ >
Nature of contingency: _____

26.E.2. Name of creditor: _____
Name of person primarily liable: _____
Amount of contingent liability: <\$ _____ >
Nature of contingency: _____

Separate Estates of the Parties

27. 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)

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

28. Liabilities of Husband's Separate Estate

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

29. 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)

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 _____): \$ _____

30. Liabilities of Wife's Separate Estate

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

Child's Property

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

31.1. 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: _____

31.2. 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: _____

31.3. 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: _____

Trust and Estate Assets

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

32.1. 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 _____):
\$ _____

32.2. 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 _____):
\$ _____

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

33.1. Name(s) of person(s) holding assets:
Description of assets: _____

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

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Name of owner of beneficial interest: _____
Value of assets (as of _____):
\$ _____

33.2. 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 _____):
\$ _____

