

INFORMATION REGARDING COMPLETING THE DIVISION OF ASSETS AND LIABILITIES WORKSHEET

- **This worksheet must be filled out in its entirety. The requested information is required and will be used in the final order.**
- **If an item does not apply, please indicate with a “N/A”.**
- **Please note the columns for *separate* and *community* (marital) property and mark appropriately.**
A spouse's *separate property* consists of:
 - (1) the property owned or claimed by the spouse before marriage;
 - (2) the property acquired by the spouse during marriage by gift, devise, or descent; and
 - (3) the recovery for personal injuries sustained by the spouse during marriage, except any recovery for loss of earning capacity during marriage.*Community property* consists of the property, other than separate property, acquired by either spouse during marriage.
- **Please note the sub-columns for “wife” and “husband”. You must indicate if the wife or husband will receive the item in the final and if the item is being split between husband and wife, who will get what percent. If you are unsure, please include that in the “notes” section to the right of the item.**
- **You must provide our office with a copy of the deed or deed of trust along with the promissory note (if there is a mortgage) for all real property. You may obtain a copy of the deed/deed of trust from the county clerk’s office in the county that the real property is located in.**
- **Estimated values for the following items may be obtained from:**
 - (1) real property - Central Appraisal District in the county in which the real property is located;
 - (2) vehicles – Kelly Blue Book at <https://www.kbb.com>
 - (3) other items of value – either from an appraiser, internet research, or agreed value by the parties.*You may include (and it is preferred) a copy of the values along with this worksheet.
- Please made additional copies if you have more entries than provided.

Client Name: _____

Date: _____

Division of Assets and Liabilities Worksheet

Assets	Current Estimated Value	Separate Property		Proposed Division of Community Property				Notes
		Wife	Husband	Wife	%	Husband	%	
Real Property: (list physical address of property below with appraisal or Fair Market Value) *The property description or property ID from the CAD is not sufficient for identifying the real property. YOU MUST PROVIDE A COPY OF THE DEED or DEED OF TRUST & PROMISSORY NOTE if the property has a mortgage.								
	\$ _____ As of: _____ (date)							
	\$ _____ As of: _____ (date)							
Vehicles: (includes all cars, trucks, jet skis, boats, trailers, atvs, golf carts, go carts, etc.)								
Year: _____ Make: _____ Model: _____ VIN#: _____	\$ _____ As of: _____ (date)							
Year: _____ Make: _____ Model: _____ VIN#: _____	\$ _____ As of: _____ (date)							
Year: _____ Make: _____ Model: _____ VIN#: _____	\$ _____ As of: _____ (date)							
Year: _____ Make: _____ Model: _____ VIN#: _____	\$ _____ As of: _____ (date)							

Assets	Current Estimated Value	Separate Property		Proposed Division of Marital Property				Notes
		Wife	Husband	Wife	%	Husband	%	
Furniture and Household Items: (Includes beds, couches, etc. You can list specific items or general categories, such as kitchen appliances. You can also decide how specific you want to be in creating this list, but please keep in mind you and your spouse should be in agreement in the details, value, and the actual division of property)								
If household asset have already been divided by agreement and dispersed, you may								
(1) Household assets in the possession of and belonging solely to Wife								
(2) Household assets in the possession of and belonging solely to Husband								
Alternatively, you may itemize the assets below if household assets have not been divided.								
Assets	Current Estimated Value	Separate Property		Proposed Division of Marital Property				Notes
		Wife	Husband	Wife	%	Husband	%	
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							
	\$ _____							

Assets	Estimated Value	Separate Property		Proposed Division of Marital Property				Notes
		Wife	Husband	Wife	%	Husband	%	
<u>Financial Assets:</u> (Includes account type - savings, checking, CDs, money market, brokerage accounts, stocks, bonds and other securities) *DO NOT INCLUDE RETIREMENT AND PENSION HERE								
Name of Financial Institution: _____	\$ _____ As of: _____ (date)							
Last 4 digits of acct #: _____ Acct. type: _____								
Name of Financial Institution: _____	\$ _____ As of: _____ (date)							
Last 4 digits of acct #: _____ Acct. type: _____								
Name of Financial Institution: _____	\$ _____ As of: _____ (date)							
Last 4 digits of acct #: _____ Acct. type: _____								
Name of Financial Institution: _____	\$ _____ As of: _____ (date)							
Last 4 digits of acct #: _____ Acct. type: _____								
Name of Financial Institution: _____	\$ _____ As of: _____ (date)							
Last 4 digits of acct #: _____ Acct. type: _____								

Assets	Estimated Value	Separate Property		Proposed Division of Marital Property				Notes
		Wife	Husband	Wife	%	Husband	%	
Retirement and Pension Accounts: (Includes IRAs, 401(k)s and ESOPs. The Court must usually enter a Qualified Domestic Relations Order (QDRO) to complete the division of these assets). *Our office typically does not provide QDRO's. You will need to speak to the attorney if you will require one and we can refer you to a QDRO attorney.								
Name of Financial Institution: _____ Last 4 digits of acct #: _____ Acct. type: _____	\$ _____ As of: _____ (date)							
Name of Financial Institution: _____ Last 4 digits of acct #: _____ Acct. type: _____	\$ _____ As of: _____ (date)							
Name of Financial Institution: _____ Last 4 digits of acct #: _____ Acct. type: _____	\$ _____ As of: _____ (date)							
Other Assets: (Anything not included in the categories above, such as jewelry or collectables)								
Description: _____	\$ _____ As of: _____ (date)							
Description: _____	\$ _____ As of: _____ (date)							
Description: _____	\$ _____ As of: _____ (date)							
Description: _____	\$ _____ As of: _____ (date)							

Debts	Amt. of Debt	Separate Debt		Marital Debt				Notes
		Wife	Husband	Wife	%	Husband	%	
Mortgages:								
Lender: _____ Last 4 digits of acct. #: _____ For Property: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For Property: _____	\$ _____ As of: _____ (date)							
Motor Vehicle Loans:								
Lender: _____ Last 4 digits of acct. #: _____ For vehicle: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For vehicle: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For vehicle: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For vehicle: _____	\$ _____ As of: _____ (date)							

Debts	Amt. of Debt	Separate Debt		Marital Debt				Notes
		Wife	Husband	Wife	%	Husband	%	
Bank Loans:								
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Other Loans:								
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							
Lender: _____ Last 4 digits of acct. #: _____ For: _____	\$ _____ As of: _____ (date)							

Debts	Amt. of Debt	Separate Debt		Marital Debt				Notes
		Wife	Husband	Wife	%	Husband	%	
Credit Cards:								
CC Name: _____ Last 4 digits of acct. #: _____ Name on Card: _____	\$ _____ As of: _____ (date)							
CC Name: _____ Last 4 digits of acct. #: _____ Name on card: _____	\$ _____ As of: _____ (date)							
CC Name: _____ Last 4 digits of acct. #: _____ Name on card: _____	\$ _____ As of: _____ (date)							
CC Name: _____ Last 4 digits of acct. #: _____ Name on card: _____	\$ _____ As of: _____ (date)							
CC Name: _____ Last 4 digits of acct. #: _____ Name on Card: _____	\$ _____ As of: _____ (date)							
CC Name: _____ Last 4 digits of acct. #: _____	\$ _____ As of: _____ (date)							
Prior Years Tax liabilities:								
Year: _____	\$ _____ As of: _____ (date)							
Year: _____	\$ _____ As of: _____ (date)							

Debts	Amt. of Debt	Separate Debt		Marital Debt				Notes
		Wife	Husband	Wife	%	Husband	%	
Other: (list any other debts/financial obligations not previously listed for either you or your spouse)								
	\$ _____ As of: _____ (date)							
	\$ _____ As of: _____ (date)							
	\$ _____ As of: _____ (date)							
	\$ _____ As of: _____ (date)							