**COMMUNITY PROPERTY AND LIABILITIES SCHEDULE**

**Instructions:** Please list each asset and debt that you or your spouse have.

Bank Accounts: Please list the last 4 of each account number and put the value of the account in the column of who’s account it belongs to. If the account is joint, you can split the balance in each column.

Stocks, bonds, mutual funds: Please list each one and provide the value in the column of who’s asset this belongs to.

Insurance policies: List the name of any insurance policies you have and indicate if there is any face or cash value. If there is a debt owed on any policy, please provide the balance owed.

Real estate: Please provide the address of any real estate owned by either of you, the date purchased, the amount owed towards each property, your monthly payment and value of each property. If you believe any of the real estate is your separate property, please indicate which one and why.

Vehicles: Please list the year, make and model of each vehicle, who is going to be keeping each vehicle, list the value of the vehicle and if there is debt associated with any vehicle, please indicate the balance owed and who the debt is owed to.

Business: If you own a business, please provide the name of the business and place the value in the column of who owns the business. If the business is jointly owned, you can split the value in each column.

Household furniture: Please provide the value of the household furnishings you own.

Tax refunds: If a tax refund is pending, please provide how you want to be splitting the monies.

Retirements accounts: For each retirement account (PERA, IRA, 401k, etc…), please indicate who owns which account and provide the value of each one.

Liabilities: For each debt, please identify each one (mortgage, credit card, loans, etc…), provide the last 4 digits of the account number, the monthly payment, the total balance owed and identify who’s debt it is.

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|  | **ASSETS** |  | **Value** | |  |
|  |  |  | **Husband** | **Wife** | **Combined** |
| 1. | Cash |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 2. | Financial institution accounts:1 | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | a. \_\_\_\_\_\_\_\_\_ | Account#\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | b. \_\_\_\_\_\_\_\_\_ | Account#\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | c. \_\_\_\_\_\_\_\_\_ | Account#\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | d. \_\_\_\_\_\_\_\_\_ | Account#\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  |  |  |  |  |  |
| 3. | Stocks, bonds and mutual funds: | |  |  |  |
|  | a. \_\_\_\_\_\_\_\_\_ Sh. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | b. \_\_\_\_\_\_\_\_\_ Sh. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | c. \_\_\_\_\_\_\_\_\_ Sh. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |

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| 4. | Insurance policies: | |  |  |  |
|  | a. | Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |  |
|  |  | [Face amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_] | |  |  |
|  |  | Cash value | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  |  | Loan balance $ \_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | b. | Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |  |
|  |  | [Face amount $\_\_\_\_\_\_\_\_\_\_\_\_\_\_] | |  |  |
|  |  | Cash value | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  |  | Loan balance $ \_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |

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| 5. | Real estate: | |  |  |  |  |
|  | a. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Mortgage ($/mo) | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | REC ($/mo) | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Cost of sale | |  |  |  |  |
|  |  | ($/%) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | b. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Mortgage ($/mo) | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | REC ($/mo) | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Cost of sale | |  |  |  |  |
|  |  | ($/%) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 6. | Vehicles: | |  |  |  |  |
|  | a. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Lien ($/mo) | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
|  | b. \_\_\_\_\_\_\_\_\_ | | $\_\_\_\_\_\_\_\_\_ |  |  |  |
|  | Lien ($/mo) | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 7. | Business assets | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 8. | Household furniture | |  |  |  |  |
|  | and goods | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 9. | Tax refunds | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 10. | IRA/Keogh/Annuity | | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 11. | Retirement | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 12. | Retirement | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 13. | Other total assets | | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| Total assets | | |  | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |

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|  | **LIABILITIES** | **(Mo/Pmt)** | **Value:** | **Husband:** | **Wife:** |
| 1. | \_\_\_\_\_\_\_\_\_ | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 2. | \_\_\_\_\_\_\_\_\_ | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 3. | \_\_\_\_\_\_\_\_\_ | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 4. | \_\_\_\_\_\_\_\_\_ | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| 5. | Tax Liability | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| Total liabilities: | | $(\_\_\_\_\_\_\_) | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| **ESTIMATED NET ASSETS:** | | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| Equalization of Assets: | | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| **EQUAL ASSETS:** | | | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |

I have read the foregoing and the amounts are true and correct.  I understand that if I make a material misstatement of fact, I may be prosecuted and punished for perjury.

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| --- | --- |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name (*print*) |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mailing address (*print*) |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City, state, and zip code (*print*) |
|  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Telephone number |