

ASSET/DEBT SUMMARY

Case: _____

IF FOR BUSINESS, LIST NAME: _____

INSTRUCTIONS: USE A PENCIL ONLY. Please fill out the following form, including assets and debt for both you and your spouse. If you do not have specific information for any given question, please leave that question BLANK. For each value indicated, please provide the office with supporting evidence, such as appraisals, bank statements, blue book listings (for vehicles), credit card statements, accounting statements, etc., if available. All dates and values may be approximate.

OFFICE USE ONLY

Marital Estate: _____ Client Estate: _____ Spouse Estate: _____

% Split CLI _____ OPP _____

Buyout from _____ to _____ in amount of _____

REAL ESTATE

INSTRUCTIONS: For each piece of real estate, condos, timeshares, etc., please fill out the requested information below.

RE1 Description (Address)	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Mortgage Holder(s) Name		Mortgage(s) Amount		Client Opposing Party

RE2 Description (Address)	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Mortgage Holder Name		Mortgage Amount		Client Opposing Party

RE3 Description (Address)	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Mortgage Holder Name		Mortgage Amount		Client Opposing Party

RE4 Description (Address)	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Mortgage Holder Name		Mortgage Amount		Client Opposing Party

RETIREMENT ACCOUNTS

INSTRUCTIONS: For each retirement account such as 401(k), IRA, ESOP, Pension, etc., fill out the requested information below.

RA1 Description	Date Begun		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Vested?		Loan Amount		Client Opposing Party
RA2 Description	Date Begun		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Vested?		Loan Amount		Client Opposing Party
RA3 Description	Date Begun		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Vested?		Loan Amount		Client Opposing Party
RA4 Description	Date Begun		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Vested?		Loan Amount		Client Opposing Party

BROKERAGE ACCOUNTS, STOCK, BONDS, ETC.

INSTRUCTIONS: For each Brokerage Account, etc., please fill out the requested information below.

ST1 Description	Date Begun		Current Market Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
ST2 Description	Date Begun		Current Market Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
ST3 Description	Date Begun		Current Market Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
ST4 Description	Date Begun		Current Market Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

WHOLE LIFE INSURANCE POLICIES

INSTRUCTIONS: For WHOLE LIFE Insurance Policy, please fill out the requested information below.

LI1 Description	Date Acquired		Current Cash Value	Evidence?	Office Use Only
	Insured	Insurer/Owner	Marriage Date Value, if any		Marital Equity
			Loan Amount		Client Opposing Party
LI2 Description	Date Acquired		Current Cash Value	Evidence?	Office Use Only
	Insured	Insurer/Owner	Marriage Date Value, if any		Marital Equity
			Loan Amount		Client Opposing Party

ANNUITIES

INSTRUCTIONS: For each annuity, please fill out the requested information below.

AN1 Description	Date Acquired		Present Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
AN2 Description	Date Acquired		Present Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

BANK ACCOUNTS

INSTRUCTIONS: For each check, savings, or other bank account, please fill out the requested information below.

BA1 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
BA2 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
BA3 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
BA4 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

BA5 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

BA6 Description			Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

MOTOR VEHICLES

INSTRUCTIONS: For each car, truck, boat, motorcycle, airplane, etc., please fill out the requested information below.

MV1 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Lender's Name		Loan Amount		Client Opposing Party

MV2 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Lender's Name		Loan Amount		Client Opposing Party

MV3 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Lender's Name		Loan Amount		Client Opposing Party

MV4 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Lender's Name		Loan Amount		Client Opposing Party

BUSINESS, CORPORATION

INSTRUCTIONS: For separate business, such as a partnership, C or S corporation, LLC, etc., please fill out the requested information below. Assets owned by a business should not be listed elsewhere on this form. SEE ATTORNEY FOR FURTHER INSTRUCTIONS.

BU1 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Type of Business Entity		Ownership Interest		Client Opposing Party

BU2 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
	Type of Business Entity		Ownership Interest		Client Opposing Party

OTHER ASSETS

INSTRUCTIONS: For each other asset that you feel should be specifically dealt with, please fill out the requested information below. Please group items together if possible, such as "living room furniture" or "tools", etc.

AS1 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
AS2 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
AS3 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party
AS4 Description	Date Acquired		Current Value	Evidence?	Office Use Only
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity
					Client Opposing Party

AS5 Description	Date Acquired		Current Value	Evidence?	Office Use Only	
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity	
					Client	Opposing Party
AS6 Description	Date Acquired		Current Value	Evidence?	Office Use Only	
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity	
					Client	Opposing Party
AS7 Description	Date Acquired		Current Value	Evidence?	Office Use Only	
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity	
					Client	Opposing Party
AS8 Description	Date Acquired		Current Value	Evidence?	Office Use Only	
	Who Owns	Who Keeps	Marriage Date Value, if any		Marital Equity	
					Client	Opposing Party

CREDIT CARDS/OTHER DEBT

INSTRUCTIONS: For each credit card or other debt NOT ALREADY DEALT WITH ABOVE. Do not list mortgages, car loans, etc., included in the assets data above.

CC1 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC2 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC3 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC4 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party

Credit Cards Other Debt, Continued

CC5 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC6 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC7 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party
CC8 Description			Current Balance	Evidence?	Office Use Only
	Who Owes	Who Keeps	Marriage Date Balance, if any		Marital Debt
					Client Opposing Party