

ASSET/DEBT CHECKLIST

I. REAL PROPERTY (I.E. House, vacation home, land, buildings, ect.) – please provide supporting documentation

(A) Address _____

List all names on Deed _____

Date of purchase _____ Value at date of purchase _____

Present value _____ Present mortgage balance _____

Balance of mortgage at date of separation _____

Monthly payment including taxes & insurance _____

(B) Address _____

List all names on Deed _____

Date of purchase _____ Value at date of purchase _____

Present value _____ Present mortgage balance _____

Balance of mortgage at date of separation _____

Monthly payment including taxes & insurance _____

(C) Address _____

List all names on Deed _____

Date of purchase _____ Value at date of purchase _____

Present value _____ Present mortgage balance _____

Balance of mortgage at date of separation _____

Monthly payment including taxes & insurance _____

II. MOTOR VEHICLES (I.E. automobile, truck, camper, mobile home, motorcycle, boat, airplane, or vehicle) – please provide supporting documentation

(A) _____
Year Make Model

Is it owned or leased _____ Date of purchase or lease _____

List the names on the title or lease _____

Value as of the date of purchase _____ Present value _____
If purchased

How much is the monthly payment _____

(B) _____
Year Make Model

Is it owned or leased _____ Date of purchase or lease _____

List the names on the title or lease _____

Value as of the date of purchase _____ Present value _____
If purchased

How much is the monthly payment _____

(C) _____
Year Make Model

Is it owned or leased _____ Date of purchase or lease _____

List the names on the title or lease _____

Value as of the date of purchase _____ Present value _____
If purchased

How much is the monthly payment _____

III. BANK ACCOUNTS – please provide supporting documentation

(A) Name of Bank _____

Type of account (checking, savings, etc.) _____

Names on account _____

Account number _____ Date account was open _____

Amount presently in account _____ Amount at date of separation _____

(B) Name of Bank _____

Type of account (checking, savings, etc.) _____

Names on account _____

Account number _____ Date account was open _____

Amount presently in account _____ Amount at date of separation _____

(C) Name of Bank _____

Type of account (checking, savings, etc.) _____

Names on account _____

Account number _____ Date account was open _____

Amount presently in account _____ Amount at date of separation _____

(D) Name of Bank _____

Type of account (checking, savings, etc.) _____

Names on account _____

Account number _____ Date account was open _____

Amount presently in account _____ Amount at date of separation _____

IV. RETIRMENT ACCOUNTS – please provide supporting documentation

(A) Names on account _____

Name of Plan (IRA, 401(k), Defined Benefit Plan, ect.) _____

Account number _____ Name of Bank/Plan administrator _____

Date account opened/plan participation commenced _____

Amount at date of separation _____ Current account balance _____

(B) Names on account _____

Name of Plan (IRA, 401(k), Defined Benefit Plan, ect.) _____

Account number _____ Name of Bank/Plan administrator _____

Date account opened/plan participation commenced _____

Amount at date of separation _____ Current account balance _____

(C) Names on account _____

Name of Plan (IRA, 401(k), Defined Benefit Plan, ect.) _____

Account number _____ Name of Bank/Plan administrator _____

Date account opened/plan participation commenced _____

Amount at date of separation _____ Current account balance _____

(D) Names on account _____

Name of Plan (IRA, 401(k), Defined Benefit Plan, ect.) _____

Account number _____ Name of Bank/Plan administrator _____

Date account opened/plan participation commenced _____

Amount at date of separation _____ Current account balance _____

V. BONDS, STOCKS, AND OTHER SECURITIES – please provide supporting documentation

(A) Identify Security or Issuer _____

How title held and name(s) of all others in title _____

Number of shares/principal amount of bonds _____ Date of Purchase _____

Cost _____ Value at date of separation _____ Present value _____

(B) Identify Security or Issuer _____

How title held and name(s) of all others in title _____

Number of shares/principal amount of bonds _____ Date of Purchase _____

Cost _____ Value at date of separation _____ Present value _____

(C) Identify Security or Issuer _____

How title held and name(s) of all others in title _____

Number of shares/principal amount of bonds _____ Date of Purchase _____

Cost _____ Value at date of separation _____ Present value _____

VI. LIFE INSURANCE – please provide supporting documentation

(A) Insurance Company and Policy # _____

Face Value _____ Term or Whole Life _____

Identity of the owner, insured, and beneficiary and any relationship to you

Present Case Surrender Value _____ Annual Premium _____

(B) Insurance Company and Policy # _____

Face Value _____ Term or Whole Life _____

Identity of the owner, insured, and beneficiary and any relationship to you

Present Case Surrender Value _____ Annual Premium _____

(C) Insurance Company and Policy # _____

Face Value _____ Term or Whole Life _____

Identity of the owner, insured, and beneficiary and any relationship to you

Present Case Surrender Value _____ Annual Premium _____

(D) Insurance Company and Policy # _____

Face Value _____ Term or Whole Life _____

Identity of the owner, insured, and beneficiary and any relationship to you

Present Case Surrender Value _____ Annual Premium _____

VII. BUSINESS INTEREST AND PARTNERSHIPS – please provide supporting documentation

(A) State partnership name _____

Location of office _____
Street City/State Zip Code

State whether it is a general or limited partnership _____

Whether you are a general or limited partner _____

State your percentage ownership interest _____

Name(s) and address(es) of all other partners:

State the date initial interest acquired, the cost, the percentage ownership and state the date, cost and percentage for any subsequent acquisitions

If within the past five (5) years have sold, gifted, or otherwise disposed of all or part of your interest, state the date(s), percentage of interest involved, and the terms of sale or other disposition:

VIII. OTHER ASSETS – please provide supporting documentation

Do either you or your spouse own any other property not previously listed (excluding household items). If so, please describe:

IX. DEBTS

(A) Type of Debt (credit card, loan, mortgage, etc.) _____

In whose name is the debt _____

Name of creditor _____ Amount of debt _____

Was this debt accrued during marriage & prior to separation _____

(B) Type of Debt (credit card, loan, mortgage, etc.) _____

In whose name is the debt _____

Name of creditor _____ Amount of debt _____

Was this debt accrued during marriage & prior to separation _____

(C) Type of Debt (credit card, loan, mortgage, etc.) _____

In whose name is the debt _____

Name of creditor _____ Amount of debt _____

Was this debt accrued during marriage & prior to separation _____

(D) Type of Debt (credit card, loan, mortgage, etc.) _____

In whose name is the debt _____

Name of creditor _____ Amount of debt _____

Was this debt accrued during marriage & prior to separation _____

(E) Type of Debt (credit card, loan, mortgage, etc.) _____

In whose name is the debt _____

Name of creditor _____ Amount of debt _____

Was this debt accrued during marriage & prior to separation _____