

IN THE \_\_\_\_\_ COURT OF THE STATE OF \_\_\_\_\_

FOR THE COUNTY OF \_\_\_\_\_

\_\_\_\_\_ DIVISION

**In re the Matter of:** \_\_\_\_\_ ,

Petitioner,

and

\_\_\_\_\_ ,

Respondent.

**Case No.** \_\_\_\_\_

### **SCHEDULE OF ASSETS AND DEBTS**

I, \_\_\_\_\_ , declare the following to be a true and complete schedule of my assets and debts as of the \_\_\_\_\_ day of \_\_\_\_\_ , 20\_\_\_\_\_ .

### **I. IDENTIFICATION OF PARTY FILING SCHEDULE**

1. **Full Legal Name:** \_\_\_\_\_

2. **Date of Birth:** \_\_\_\_\_

3. **Current Street Address:** \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code:

\_\_\_\_\_

4. **Phone Number:** \_\_\_\_\_

5. **Email Address:** \_\_\_\_\_

## II. ASSETS

### A. Real Property

#### 1. Primary Residence:

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Legal Description: \_\_\_\_\_

**Date Acquired:** \_\_\_\_\_

Current Fair Market Value: \$ \_\_\_\_\_

Amount of Encumbrance (Mortgage/Lien): \$ \_\_\_\_\_

Name of Lender: \_\_\_\_\_

Monthly Payment: \$ \_\_\_\_\_

Party Responsible for Payment: \_\_\_\_\_

#### 2. Other Real Property (e.g., investment property, vacation home):

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Legal Description: \_\_\_\_\_

**Date Acquired:** \_\_\_\_\_

Current Fair Market Value: \$ \_\_\_\_\_

Amount of Encumbrance (Mortgage/Lien): \$ \_\_\_\_\_

Name of Lender: \_\_\_\_\_

Monthly Payment: \$ \_\_\_\_\_

Party Responsible for Payment: \_\_\_\_\_

#### 3. Additional Real Property (if any):

### B. Cash and Bank Accounts

**1. Checking Accounts:**

Bank Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_

Bank Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_

**2. Savings Accounts:**

Bank Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_

Bank Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_

**3. Other Cash/Accounts (e.g., money market, CDs):**

Description: \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_

Description: \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_

**C. Stocks, Bonds, Mutual Funds, and Other Investments**

**1. Brokerage Accounts:**

Institution Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Description of Holdings: \_\_\_\_\_

Current Value: \$ \_\_\_\_\_

**2. Individual Stocks/Bonds:**

Company/Issuer: \_\_\_\_\_ Number of Shares/Units: \_\_\_\_\_

Current Value: \$ \_\_\_\_\_

Company/Issuer: \_\_\_\_\_ Number of Shares/Units: \_\_\_\_\_

Current Value: \$ \_\_\_\_\_

**3. Mutual Funds:**

Fund Name: \_\_\_\_\_ Number of Shares/Units: \_\_\_\_\_

Current Value: \$ \_\_\_\_\_

Fund Name: \_\_\_\_\_ Number of Shares/Units: \_\_\_\_\_

Current Value: \$ \_\_\_\_\_

**4. Other Investments (e.g., cryptocurrency, precious metals):**

Description: \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

Description: \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**D. Retirement and Pension Accounts**

**1. 401(k), 403(b), 457 Plans:**

Institution Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Type of Plan: \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**2. Individual Retirement Accounts (IRA, Roth IRA, SEP IRA):**

Institution Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Type of Plan: \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**3. Pension Plans:**

Plan Name: \_\_\_\_\_ Administrator: \_\_\_\_\_

Estimated Current Value/Benefit: \$ \_\_\_\_\_

**4. Other Retirement Accounts:**

Description: \_\_\_\_\_ Current Value: \$ \_\_\_\_\_

**E. Life Insurance**

**1. Cash Value Policies:**

Company Name: \_\_\_\_\_ Policy Number: \_\_\_\_\_

Type of Policy: \_\_\_\_\_ Cash Surrender Value: \$ \_\_\_\_\_

Beneficiary: \_\_\_\_\_

**2. Term Life Policies (no cash value):**

Company Name: \_\_\_\_\_ Policy Number: \_\_\_\_\_

Death Benefit: \$ \_\_\_\_\_

Beneficiary: \_\_\_\_\_

**F. Vehicles**

**1. Vehicle 1:**

Year/Make/Model: \_\_\_\_\_

VIN (last 4 digits): \_\_\_\_\_ Current Fair Market Value: \$ \_\_\_\_\_

Amount of Encumbrance (Loan): \$ \_\_\_\_\_

Name of Lender: \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

**2. Vehicle 2:**

Year/Make/Model: \_\_\_\_\_

VIN (last 4 digits): \_\_\_\_\_ Current Fair Market Value: \$ \_\_\_\_\_

Amount of Encumbrance (Loan): \$ \_\_\_\_\_

Name of Lender: \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

**3. Other Vehicles (e.g., motorcycles, boats, RVs):**

Description: \_\_\_\_\_ Current Fair Market Value: \$ \_\_\_\_\_

Amount of Encumbrance: \$ \_\_\_\_\_

**G. Household Furnishings, Appliances, and Personal Effects**

**1. General Description:** (e.g., furniture, electronics, art, clothing, tools)

**Estimated Total Current Fair Market Value:** \$ \_\_\_\_\_

**H. Jewelry, Antiques, and Collectibles**

**1. Description of Items:** (e.g., specific jewelry pieces, coin collections, art)

**Estimated Total Current Fair Market Value:** \$ \_\_\_\_\_

**I. Business Interests**

**1. Name of Business:** \_\_\_\_\_

Type of Entity (e.g., sole proprietorship, partnership, LLC, corporation): \_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_ %

Estimated Current Fair Market Value of Interest: \$ \_\_\_\_\_

**2. Name of Business:** \_\_\_\_\_

Type of Entity: \_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_ %

Estimated Current Fair Market Value of Interest: \$ \_\_\_\_\_

## **J. Other Assets**

### **1. Accounts Receivable/Money Owed to You:**

Description: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

Description: \_\_\_\_\_ Amount Owed: \$ \_\_\_\_\_

### **2. Intellectual Property (e.g., patents, copyrights, trademarks):**

Description: \_\_\_\_\_ Estimated Value: \$ \_\_\_\_\_

### **3. Lawsuit Claims/Settlements:**

Description: \_\_\_\_\_ Estimated Value: \$ \_\_\_\_\_

### **4. Other Assets Not Listed Above:**

Description: \_\_\_\_\_ Estimated Value: \$ \_\_\_\_\_

Description: \_\_\_\_\_ Estimated Value: \$ \_\_\_\_\_

## **III. DEBTS**

### **A. Secured Debts (other than those listed with assets above)**

1. **Type of Debt:** \_\_\_\_\_ (e.g., second mortgage, home equity line of credit)

Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Original Amount: \$ \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_

Monthly Payment: \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_

Asset Securing Debt: \_\_\_\_\_

Party Responsible for Payment: \_\_\_\_\_

2. **Type of Debt:**

\_\_\_\_\_  
Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Original Amount: \$ \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_  
Asset Securing Debt: \_\_\_\_\_  
Party Responsible for Payment: \_\_\_\_\_

**B. Unsecured Debts**

**1. Credit Cards:**

Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_  
Date Incurred: \_\_\_\_\_ Party Responsible for Payment: \_\_\_\_\_  
Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_  
Date Incurred: \_\_\_\_\_ Party Responsible for Payment: \_\_\_\_\_  
Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_  
Date Incurred: \_\_\_\_\_ Party Responsible for Payment: \_\_\_\_\_

**2. Personal Loans:**

\_\_\_\_\_  
Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Original Amount: \$ \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_  
Party Responsible for Payment: \_\_\_\_\_

**3. Student Loans:**

Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_  
Original Amount: \$ \_\_\_\_\_ Current Balance: \$ \_\_\_\_\_  
Monthly Payment: \$ \_\_\_\_\_ Date Incurred: \_\_\_\_\_  
Party Responsible for Payment: \_\_\_\_\_

**4. Medical Bills:**

Creditor Name: \_\_\_\_\_ Account Number (last 4 digits): \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Party Responsible for Payment:

\_\_\_\_\_

**5. Other Unsecured Debts (e.g., taxes owed, judgments):**

Description: \_\_\_\_\_ Creditor Name: \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Party Responsible for Payment: \_\_\_\_\_

Description: \_\_\_\_\_ Creditor Name: \_\_\_\_\_

Current Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Date Incurred: \_\_\_\_\_ Party Responsible for Payment:

\_\_\_\_\_

**IV. SUMMARY OF ASSETS AND DEBTS**

1. **Total Estimated Value of All Assets:** \$ \_\_\_\_\_

2. **Total Estimated Amount of All Debts:** \$ \_\_\_\_\_

3. **Net Worth (Assets minus Debts):** \$ \_\_\_\_\_

I declare under penalty of perjury under the laws of the State of \_\_\_\_\_ that the foregoing is true and correct.

Executed on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

**Signature:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

**Role / Capacity:** \_\_\_\_\_

**CERTIFICATE OF SERVICE**

I hereby certify that on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, I served a true and correct copy of the foregoing SCHEDULE OF ASSETS AND DEBTS upon the following party(ies) by the method(s) indicated below:

**Recipient:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Method of Service:**  U.S. Mail, postage prepaid  
 Hand Delivery  
 Electronic Service (email to \_\_\_\_\_)  
 Other: \_\_\_\_\_

**Recipient:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Method of Service:**  U.S. Mail, postage prepaid  
 Hand Delivery  
 Electronic Service (email to \_\_\_\_\_)  
 Other: \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_