

Recording Your Assets

	Joint Property	Husband's Separate Property	Wife's Separate Property	Net Value
House				
Business				
Car				
Savings				
Checking				
Pension				
IRA				
CD				
Furniture				
Other				
Total:				

After you've made your basic list, gather the details, if relevant, requested below:

Residence

Current market value (FMV) _____

Current mortgage amount _____

Monthly payments, including utilities and rent or maintenance) _____

What did you pay for the house? _____

Will the house be sold now or later? _____

If the house is not sold, who will live in it? _____

Asset Checklist

Annuities _____

Checking accounts, bank accounts, certificates of deposit, savings accounts, and so on _____

Stocks, bonds, mutual funds, limited partnerships _____

Real estate (in addition to the primary residence, other rentals, vacation properties, and timeshares) _____

IRAs, 401(k), 403(b), pension, deferred compensation, etc. _____

Unpaid bonuses and noncash compensation such as company car and paid lunches _____

Defined benefit plan (you will need details for later) _____

Life insurance cash value _____

Personal possessions _____

Antiques and collectibles _____

Debts (credit cards, loans, personal debt, and so on) _____

Make sure you have gathered sample paycheck stubs and tax returns for the last three years as well.