

**LAW OFFICES OF JOSEPH ADELIZZI**  
**191 Calle Magdalena**  
**Suite 220**  
**Encinitas, CA 92024**  
**(760) 632-1338**

**ASSET AND DEBT STATEMENT**

**I. SEPARATE PROPERTY (Yours only):** Things, money, and real estate that you **owned prior to this marriage**, received as a gift or inheritance, or **obtained after you separated**.

---

---

---

---

---

---

---

**II. MARITAL PROPERTY:** Things, money, and real estate that you own and that are not your separate property.

a. Real estate

Address: \_\_\_\_\_  
Estimated fair market value: \_\_\_\_\_  
Loan amounts: \_\_\_\_\_  
Estimated equity: \_\_\_\_\_

Address: \_\_\_\_\_  
Estimated fair market value: \_\_\_\_\_  
Loan amounts: \_\_\_\_\_  
Estimated equity: \_\_\_\_\_

Address: \_\_\_\_\_  
Estimated fair market value: \_\_\_\_\_  
Loan amounts: \_\_\_\_\_  
Estimated equity: \_\_\_\_\_

b. Money: bank accounts and cash

<u>Location</u>	<u>Account #</u>	<u>Current Balance</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

c. Stocks, bonds, and limited partnerships

<u>Name</u>	<u>Current Value</u>
_____	_____
_____	_____
_____	_____

d. Secured and unsecured notes

<u>Borrower</u>	<u>Due Date</u>	<u>Current Balance</u>
_____	_____	_____

---

e. Tax refunds due

<u>Year</u>	<u>Date Expected</u>	<u>Amount Due</u>
-------------	----------------------	-------------------

---

f. Retirement, pension, profit-sharing, and annuities

<u>Name of Plan</u>	<u>Current Balance</u>
---------------------	------------------------

---

---

---

g. Life insurance

<u>Carrier</u>	<u>Beneficiary</u>	<u>Cash Value, if any</u>	<u>Face Value</u>
----------------	--------------------	---------------------------	-------------------

---

---

---

h. Business interests

<u>Name of company</u>	<u>Date Acquired</u>	<u>Estimate of Value</u>
------------------------	----------------------	--------------------------

---

---

i. Household furniture, furnishings, and appliances: Has division occurred? \_\_\_\_\_

If not, list items not currently in your possession that you would like to have?

---

---

j. Cars, trucks, and boats

<u>Year</u>	<u>Make</u>	<u>Estimated Value</u>	<u>Loan Balance</u>	<u>Equity</u>
-------------	-------------	------------------------	---------------------	---------------

---

---

---

III. **SEPARATE DEBTS:**(Incurred before marriage, during marriage, or after separation)

<u>Creditor's Name</u>	<u>Balance Owing</u>
------------------------	----------------------

---

---

IV. **MARITAL DEBTS:** (Incurred during marriage, except for separate debts)

<u>Creditor's Name</u>	<u>Balance Owing</u>
------------------------	----------------------

---

---

---