Property and Debt Schedule

General educational example • Local legal review required

A companion worksheet for recording information and proposed allocations during separation. It is not a standalone separation agreement, deed, creditor release or retirement-plan order.

Spouse A and contact address [Enter details]

Spouse B and contact address [Enter details]

Jurisdiction and preparation date [Enter details]

Relevant court orders or earlier agreements [Identify dates and references; attach securely where appropriate]

Use descriptions or partial account identifiers in working copies. Keep sensitive supporting records private. Do not sign an incomplete form. Each spouse should have a separate opportunity to obtain independent legal advice.

1. Scope and supporting records

Schedule attached to [Agreement / proposal title, date and version, if any]

Valuation date and method [Statement dates, appraisal basis and any estimates]

Documents exchanged and missing records [List statements, valuations and records still needed]

2. Assets and debts

Duplicate rows as needed. Use partial identifiers. An entry is a proposal unless incorporated into appropriately reviewed and completed arrangements.

Asset / owner	Value and date	Proposed allocation / next step
[Home / title holder]	[Value; mortgage]	[Proposal; deed / lender steps]
[Account / partial ID]	[Balance and date]	[Proposal; institution process]
[Vehicle / personal property]	[Value and date]	[Proposal; transfer documents]
[Retirement / benefit]	[Value and date]	[Proposal; specialist / plan advice]

Debt / named borrowers	Balance and date	Proposed payer / creditor step
[Loan / partial ID]	[Amount and date]	[Proposal; consent / refinancing]
[Card or other debt]	[Amount and date]	[Proposal; account arrangements]

Disputed, contingent or undisclosed items [Describe uncertainty and information required]

A proposed allocation between spouses does not automatically alter a lender’s contract or transfer ownership. Keep supporting records and identify the separate approvals or documents needed for each item.

3. Follow-through and review

Action	Responsible person	Due date / evidence
[Obtain valuation or advice]	[Name]	[Date / record]
[Contact lender or plan administrator]	[Name]	[Date / response]
[Prepare separate transfer documents]	[Name]	[Date / document]

Items agreed in principle / still disputed [Clearly distinguish each category]

Local review and unresolved questions

Issues still requiring advice or documents [List each open issue and the person responsible for the next step]

This example does not grant a divorce or court order, override an existing order, bind a creditor, transfer title, or automatically waive support, inheritance or retirement rights. Check required disclosures, formalities and any court or third-party process in the relevant jurisdiction.

Educational example notice

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