

1. Monthly Income (Convert annual, bi-monthly, and weekly amounts to monthly amounts.)

| Gross Monthly Income (before taxes \& deductions) from salary \& wages, including commissions, bonuses, overtime, self-employment, business income, other jobs, and monthly reimbursed expenses. Fashion industry has been undergoing restructuring. There is no guarantee that salary will continue at this level in future years., Bonus income is highly variable. | \$ | 17,775 | Social Security Benefits (SSA) <br> $\square$ SSDI (Disability insurance - entitlement program) SSI (supplemental income - need based) | \$ |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Unemployment \& Veterans' Benefits |  |  | Disablity \& Workers' compensation |  |  |
| Pension \& Retirement Benefits |  |  | Interest \& Dividends |  |  |
| Public Assistance (TANF) |  |  | Other |  |  |
|  |  |  | Total Monthly Income | \$ | 17,775 |


| Miscellaneous Income |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :---: | :---: |
| Royalties, Trusts, \& Other Investments | $\$$ | Contributions from Others | $\$$ |  |  |
| Dependent Children's monthly gross <br> income. Source: | $\$$ | All other sources, i.e. personal injury <br> settlement, non-reported income, etc. | $\$$ |  |  |
| Rental Net Income | Expense Accounts |  |  |  |  |
| Child Support from Others | Other |  |  |  |  |
| Spousal Support from Others | Other |  |  |  |  |
| Total Monthly Miscellaneous Income |  |  |  |  | $\$$ |
|  | Total Income | $\mathbf{\$}$ | 17,775 |  |  |

## 2. Monthly Deductions (Mandatory and Voluntary)



## 3. Monthly Expenses

Note: List regular monthly expenses below that you pay on an on-going basis and that are not identified in the deductions above.
A. Housing

B. Utilities and Miscellaneous Housing Services

| 8 Devil's Head Cir, Golden | Cost Per Month |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Electricity 2012 Average. Includes gas. | \$ 900 | Water and Sewer | \$ | 70 |
| Cell Phone \& Pager Included in family plan. | 250 | Furniture \& Appliance Repair |  |  |
| Cable / Satellite TV FIOS package from telecom provider Includes internet and home phone. | 100 | Other |  | 833 |
| Total Utilities and Miscellaneous Housing Services: 8 Devil's Head Cir, Golden |  |  | \$ | 2,153 |
| 4 Antero Ct, Golden | Cost Per Month |  | Cost Per Month |  |
| Gas \& Electricity | \$ | Water, Sewer, Trash Removal | \$ |  |
| Telephone |  | Property Care |  |  |
| Internet Provider, Cable \& Satellite TV |  | Other |  |  |
| Total Utilities and Miscellaneous Housing Services: 4 Antero Ct, Golden |  |  | \$ | 0 |
| Total Utilities and Miscellaneous Housing Services: (all Residences) |  |  | \$ | 2,153 |

## C. Food \& Supplies

|  | Cost Per <br> Month |  | Cost Per <br> Month |
| :--- | :---: | :--- | :--- |
| Groceries <br> Based on review of credit card <br> statements. | $\$ 1,213$ | Eating Out <br> Based on Amex, Visa and Capital One <br> credit cards. | $\$ 2,167$ |
| Total Food \& Supplies | $\$$ | 3,380 |  |

D. Health Care Costs (Co-pays, Premiums, etc.)

|  | Cost Per Month |  | Cost Per Month |  |
| :---: | :---: | :---: | :---: | :---: |
| Doctor \& Vision Care | \$ | Orthodontic | \$ |  |
| Medicine \& RX Drugs |  | Therapist |  |  |
| Premiums (if not paid by employer) |  | Other 1/2 of 2012 Out of Pocket Medical |  | 184 |
|  |  | Total Health Care | \$ | 184 |

E. Transportation \& Recreation Vehicles (Motorcycles, Motor Homes, Boats, ATV, Snowmobiles, etc.)

|  | Cost Per <br> Month |  | Cost Per <br> Month |
| :--- | :--- | :--- | ---: | ---: |
| Primary Vehicle Payment | $\$$ | Other Vehicle Payments | $\$$ |
| Gasoline <br> Estimate based on miles driven, car <br> city-rated MPG, and price of gas. | 520 | License / City Stickers <br> For three vehicles. | 542 |
| Bus \& Commuter Fees | Other Misc. | Total Transportation | $\$ \mathbf{1 , 2 2 9}$ |

F. Children's Expenses and Activities

|  | Cost Per Month |  |  | Cost Per Month |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Clothing \& Shoes | \$ | 167 | Child care Bright Horizons 5 days/week | \$ | 1,833 |
| Extraordinary Expenses i.e. Special |  |  | School lunch |  | 167 |
| Clubs / Summer Camps Includes costs of horseback riding and mountain climbing camps. |  | 667 | Tuition (for children) <br> Tuition at Holy Redeemer Academy. |  | 1,000 |
| Other |  |  |  |  |  |
|  |  |  | Total Children's Expenses and Activities | \$ | 3,834 |

G. Education for you Please identify status:

Full-time student $\square$ Part-time student

|  | Cost Per <br> Month |  | Cost Per <br> Month |  |
| :--- | :---: | :--- | :--- | :--- |
| Tuition, Books, Supplies, Fees, etc. | $\$$ | Other | Total Education | $\$$ |
|  |  |  | 0 |  |

H. Maintenance \& Child Support (that you pay)

|  | Cost Per <br> Month |  | Cost Per <br> Month |  |  |  |
| :--- | :--- | :--- | :--- | :---: | :---: | :---: |
| Spousal Maintenance |  | Child Support |  |  |  |  |
| $\square$ This family | $\square$ This family |  |  |  |  |  |
| $\square$ Other family | $\square$ Other family |  |  |  |  |  |
| Total Maintenance and Child Support |  |  |  |  |  | $\$$ |

I. Miscellaneous (Please list on-going expenses not covered in the sections above)

|  | Cost Per Month |  |  | Cost Per Month |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Entertainment From Amex and Visa for prior year | \$ | 871 | Clothing for adults Based on prior year. Probably will not be continued at this level. | \$ | 300 |
| Legal/Accounting Fees |  |  | Newspapers, magazines, books Wall St. Journal subscription |  | 17 |
| Charitable <br> Based on prior year tax return. |  | 2,083 | Movie \& Video Rentals |  |  |
| Travel <br> Vacations to Patagonia and South Africa in prior year. May not be continued at this level. |  | 3,509 | Savings |  |  |
| Membership/Clubs |  |  | Home Furnishing Significant renovation, not likely to be sustained. |  | 905 |
| Pets/Pet Care Mostly for vet for family dog. Based on Visa for prior year. |  | 144 | Sports Events / Participation |  |  |
| Other | \$ |  | Other | \$ |  |
| Total Miscellaneous |  |  |  | \$ | 7,829 |
| Total Monthly Expenses (Totals from A I) |  |  |  |  |  |
|  |  |  |  | \$ | 27,146 |

## 4. Debts (unsecured)

List unsecured debts such as credit cards, store charge accounts, loans from family members, back taxes owed to the I.R.S., etc. Do not list debts that are liens against your property, such as mortgages and car loans, because that payment is already listed as an expense above, and the total of the debt is shown elsewhere as a deduction from value where that asset is listed, such as under Real Estate or Motor Vehicles.

For name on account, "P" = Petitioner, "C/R" = Co-Petitioner or Respondent, "J" = Joint.

| Name of Creditor | Account <br> Number <br> (last <br> 4-digits <br> only) | $\mathbf{P}$ | $\mathbf{C / R}$ | $\mathbf{J}$ | Date of <br> Balance | Balance | Minimum <br> Monthly <br> Payment <br> Required | Reason for <br> Which Debt <br> was Incurred |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Amex \#59292 |  | $\square$ | $\square$ | $\square$ |  | 48,314 |  |  |
|  |  | $\square$ | $\square$ | $\square$ |  |  |  |  |
|  |  | $\square$ | $\square$ | $\square$ |  |  |  |  |
|  | $\square$ | $\square$ | $\square$ |  |  |  |  |  |
| Unsecured Debt Balance |  |  |  |  |  |  | 48,314 | 0.00 | | Total Minimum |
| :--- |
| Monthly Payment |

SWORN FINANCIAL STATEMENT SUMMARY
(INCOME/EXPENSES)

| Total Income | \$ |  | 17,775 | A |
| :---: | :---: | :---: | :---: | :---: |
| Total Monthly Deductions | \$ |  | 2,870 | B |
| Total Monthly Net Income (A minus B) | \$ |  | 14,905 |  |
| Total Monthly Expenses | \$ |  | 27,146 C |  |
| Total Minimum Monthly Payment Required - Debts Unsecured | \$ |  | 0 | D |
| Total Monthly Expenses and Payments (C plus D) |  | \$ | 27,146 |  |
| Net Excess or Shortfall (Monthly Net Income less Monthly Expenses and Payments) (+/-) |  | \$ | (12,2 |  |

## 5. Assets

You MUST disclose all assets correctly. By indicating "None", you are stating affirmatively that you or the other party, do not have assets in that category. Please attach additional copies of pages 5 \& 6 to identify your assets, if necessary.

```
"P" = Petitioner, "C/R" = Co-Petitioner or Respondent, "J" = Joint.
```

| A. Real Estate None | How <br> Titled | Current Value | Amount Owed | Non-Marital Value |  | Marital ity |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 8 Devil's Head Cir, Golden 1st Mortgage: $\$ 1,146,574$ | J | \$ 2,200,000 | \$ 1,146,574 | \$ 0 | \$ | 1,053,426 |
| 4 Antero Ct, Golden | P | 872,000 |  | 0 |  | 872,000 |
| Mortgage is completely paid off with significant contrbution from Julene's parents. |  |  |  |  |  |  |
| Total |  | \$ 3,072,000 | \$ 1,146,574 | \$ 0 | \$ | 1,925,426 |


| B. Motor Vehicles \& Recreation Vehicles Including Motorcycles, ATV's, Boats, etc.) None | How Titled | Current Value | Amount Owed |  | Non-Marital Value |  | Marital ty |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Chevrolet Silverado | C/R | \$ 38,000 | \$ |  | \$ 0 | \$ | 38,000 |
| Lexus R-80 | C/R | 46,300 |  |  | 0 |  | 46,300 |
| Chevrolet Impala | C/R | 22,800 |  |  | 0 |  | 22,800 |
| Cigarette Speedboat | C/R | 1,860,000 |  |  | 0 |  | 1,860,000 |
| Total |  | \$ 1,967,100 | \$ | 0 | \$ 0 | \$ | 1,967,100 |


| C. Cash on Hand, Bank, Checking, Savings, or Health Accounts None | How Titled | Type of Account | Account Number (last 4 digits) | Current Balance |  | Non-Marital Value |  | Net Marital Equity |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Joint Checking Account 2/28/13 Value. <br> Company: Bank of America | J | Checking (2/28/2013) | 9292 | \$ | 186,322 | \$ | 0 | \$ | 186,322 |
| Joint Checking Account Company: First Third | J | Checking (2/20/2013) | 9292 |  | 28,302 |  | 0 |  | 28,302 |
| Nuveen \#43232 | P |  |  |  |  |  | 0 |  |  |
|  |  |  | Total | \$ | 214,624 | \$ | 0 | \$ | 214,624 |


| D. Life Insurance | How <br> Titled | Type of <br> Policy | Face <br> Amount of <br> Policy | Current <br> Cash <br> Surrender <br> Value | Related <br>  <br> Surrender <br> Charges |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| $\square$ None |  |  |  |  |  |


| E. Furniture, Household Goods, <br> and Other Personal Property, <br> $\square$ None | Who <br> has <br> Possession | Current <br> Value | Amount <br> Owed | Non-Marial <br> Value | Net Marital <br> Equity |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Furniture \& Household Goods | C/R | $\$$ | 25,000 | $\$$ | $\$$ | 0 | $\$$ |
|  | Total | $\$$ | $\mathbf{2 5 , 0 0 0}$ | $\$$ | $\mathbf{0}$ | $\$$ | $\mathbf{0}$ |
|  |  | $\$$ | $\mathbf{2 5 , 0 0 0}$ |  |  |  |  |


| F. Stocks, Bonds, Mutual <br>  <br> Investment Accounts <br> None | How <br> Titled | Account <br> Number <br> (last 4 digits) | Current <br> Value | Amount <br> Owed | Non-Marital <br> Value | Net Marital <br> Equity |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Merrill Lynch <br> Company: ML | J | 3922 | $\$ 8,639,292$ | $\$$ | $\$$ | 0 | $\$ 8,639,292$ |
|  |  | Total | $\$ 8,639,292$ | $\$$ | $\mathbf{0}$ | $\$$ | $\mathbf{0}$ |


| G. Pension, Profit Sharing, or Retirement Funds None | How <br> Titled | Type of Plan | Acnt \# $\qquad$ |  | rrent <br> ue | Amount Owed |  |  |  |  | arital |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Benneton 401k | C/R |  | 7322 |  | $\begin{array}{r} 210,169 \\ (2 / 28 / 2013) \end{array}$ | \$ |  | \$ | 0 | \$ | 210,169 |
| IRA | C/R |  |  |  | $\begin{array}{r} 32,000 \\ 12 / 31 / 2012) \end{array}$ |  |  |  | 0 |  | 32,000 |
| Total |  |  |  | \$ 242,169 |  | \$ | 0 | \$ 0 |  | \$ | 242,169 |

H. Miscellaneous Assets
$\square$ None If you own any of the assets identified below, please check the appropriate box.



I swear or affirm under oath that this Sworn Financial Statement, attached schedules, and mandatory disclosures contain a complete disclosure of my income, expenses, assets, and debt as of the date of my signature.

I understand that if the information I have provided changes or needs to be updated before a final decree or order is issued by the Court, that I have a duty to provide the correct or updated information.

I understand that this oath is made under penalty of perjury. I understand that if I have omitted or misstated any material information, intentionally or not, the Court will have the power to enter orders to address those matters, including the power to punish me for any statements made with the intent to defraud or mislead the Court or the other party.

Date: $\qquad$
Signature of Co-Petitioner/Respondent
Subscribed and affirmed, or sworn to before me in the County of Jefferson , State of Colorado this $\qquad$ day of $\qquad$ .

My Commission Expires: $\qquad$

Notary Public/Deputy Clerk

## CERTIFICATE OF SERVICE

To be completed if the Sworn Financial Statement is not being filed with JDF 1104 - Certificate of Compliance with Mandatory Financial Disclosures

I certify that on (date) a true and accurate copy of the SWORN FINANCIAL
STATEMENT was served on the other party by:
Hand Delivery, $\boxtimes$ E-filed, $\square$ Faxed to this number: $\qquad$ , or
$\square$ By placing it in the United States mail, postage pre-paid, and addressed to the following:
To: Caswell Johnson, Esq.
8000 E. Euclid Drive
Centennial, CO 80111

