

IN THE CIRCUIT COURT OF THE NINETEENTH JUDICIAL CIRCUIT,  
IN AND FOR MARTIN COUNTY, FLORIDA

Case No.: 432023DR000557  
Division: Domestic Relations

IN RE: MARRIAGE OF:

CHARLES A. ELLIS,  
Husband,  
and

CATHERINE J. ELLIS,  
Wife.

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**MARITAL SETTLEMENT AGREEMENT**

This Agreement is made in connection with an action for dissolution between CHARLES A. ELLIS (referred to as "Respondent" or "Husband" herein) and CATHERINE J. ELLIS (referred to as "Petitioner" or "Wife" herein), who are sworn and agree as follows:

**WHEREAS**, the parties hereto were married to each other on or about April 23, 1988;

**WHEREAS**, there are no minor children in the marriage, no other children were adopted, and none are expected;

**WHEREAS**, Husband and Wife have filed a petition for dissolution of marriage in the above case, and this Agreement is intended to be introduced into evidence in such action, to be incorporated in a Final Judgment entered therein;

**WHEREAS**, the parties acknowledge that irreconcilable differences exist, that the marriage is irretrievably broken, and that the parties intend to live separately and apart from each other.

**WHEREAS** the parties wish to settle between themselves, now and forever, their respective rights, duties, and obligations regarding property and liabilities;

**WHEREAS**, each party has read this Agreement and understands its terms and consequences, and each party believes that this Agreement is fair, just, and reasonable;

**WHEREAS**, each party has assented to this Agreement freely and voluntarily, without coercion or duress;

**NOW, THEREFORE**, in consideration of the mutual covenants, promises and

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undertakings set forth herein, and for other good and valuable consideration, the parties have agreed and do hereby agree as follows:

**ARTICLE I**  
**Equitable Distribution**

1.1. The Husband and Wife have agreed to divide their marital and nonmarital assets and liabilities consistent with Exhibit "A" attached hereto and incorporated into this Agreement. The parties acknowledge that the various financial accounts outlined in Exhibit "A" may hereafter fluctuate in value and that the amounts he/she receives in distributions from one or more of the designated accounts might vary from the figures set forth in Exhibit "A" (due to an increase or decrease in the value of said account(s) after this Agreement is executed). Still, each acknowledges and represents that he/she understands that the intent is to distribute each of the above accounts as set forth in this Agreement, plus or minus the increase/decrease in value. Except as otherwise provided in this Agreement, each party shall assume and pay all costs related to their possession and or ownership of his and her respective assets and further agrees to indemnify and hold the other harmless with respect to their ownership thereto. Further, as to all assets distributed below in this Agreement, each party represents that he/she waives any right, title, and interest he/she may have in the assets being awarded to the other party and states that he/she has no claim, nor shall he/she make any claim, on or to any aspect of said assets. The parties agree to sign whatever documents may be necessary to transfer said funds/assets without any charge to the other party within thirty days and agree that the Court shall reserve jurisdiction to the extent necessary to enter future orders to accomplish the transfer of said funds/assets.

**The Marital Residence**

1.2 There exists certain real property in which one or both parties may claim an interest, herein referred to as the "Marital Home," and more specifically described as follows:

Lot 1, Block 5, NORTH RIVER SHORES, SECTION TWO, according to the Plat thereof, as recorded in Plat Book 3, Page 50, Public Records of Martin County, Florida.

Parcel Identification Number: 30-37-41-007-005-00010-3

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1.3 The parties have agreed to sell their marital residence at 1809 NW BRIGHT RIVER, PT STUART, FL. Simultaneously executing this Marital Settlement Agreement, the parties have entered into a Confidential Real Estate Agreement concerning the terms of sale and distribution of proceeds. The parties agree to be bound to the terms of the Confidential Real Estate Agreement as if it were included in this Marital Settlement Agreement and shall be enforced as if it were part of it.

**The Anchorage Property**

1.4 There exists certain real property in which one or both parties may claim an interest and is jointly owned by the parties' adult child, Amelia, herein referred to as the "Anchorage Property," and more specifically described as follows:

Condominium Unit E-2, of Building No. 102, of THE ANCHORAGE ON THE ST. LUCIE, a Condominium, together with an undivided interest in the common elements, according to the Declaration of Condominium thereof recorded in Official Record Book 614, Page 1066, as amended from time to time, of the Public Records of St. Lude County, Florida.

1.5 The parties agree that the Anchorage Property is an asset of the child Amelia and shall be immediately transferred to her by quit claim deed as soon as possible. Both parties agree that the Husband was put on the property to qualify the daughter for a mortgage valued at approximately \$88,705.00. The parties agree to be equally responsible for the mortgage and to have the balance paid off within 30 days of executing this agreement through joint funds. Once the mortgage is paid, the property will be transferred to the daughter.

**Bank and Brokerage Accounts**

1.6 Each party shall retain any and all funds in bank accounts otherwise on deposit, including any accrued interest, in banks or any other financial institutions, in which they are in either party's sole name or from which either party has the sole right to withdraw funds or which are subject to either party's sole control, except for the transfers described above or in Exhibit "A." Any accounts in joint title shall be closed within 30 days of the execution of this Agreement.

1.7 Each party shall retain all stocks, bonds, mutual funds, and securities in their sole name, together with any dividends, splits, and other rights and privileges in connection therewith,

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including all accounts either party has the right to access to or is within the other party's sole control, except for the transfers and sales described above or in Exhibit "A."

**Division of Other Assets**

1.8 Wife shall receive exclusive ownership in the following assets and items, and Husband waives and releases any and all claim or interest in such assets and items.

(a) The parties shall equally split the furniture from the marital residence upon sale, except the Wife shall receive her personal property in the personal property list in Exhibit "B."

(b) All clothing, jewelry, and personal effects in the Wife's possession or subject to her sole control.

(c) Wife shall receive her 2017 Prius.

1.9 Husband shall receive exclusive ownership in the following assets and items, and Wife waives and releases any and all claim or interest in such assets and items:

(a) The parties shall equally split the furniture from the marital residence upon sale, except the Wife shall receive her personal property in the personal property list in Exhibit "B."


(b) All clothing, jewelry, and personal effects in possession of the Husband or subject to his sole control, except the Wife shall receive her personal property in the personal property list in Exhibit "B."

(c) Husband shall receive his 2003 Chevy Venture.

1.10 Husband has a 401k with Fidelity listed in line 31 in Exhibit "A," which shall be split with the Wife receiving an in-kind payment of 47% of the value of the account, which includes stock and securities, including any passive appreciation or depreciation from 6/13/2024 until the day of the transfer to the Wife and the Husband retaining the remainder of those accounts. Each respective party shall be responsible for one-half the cost of drafting and filing their Qualified Domestic Relations Order, which Matthew Lundy, Esq, shall draft. The parties shall request that the Court reserve jurisdiction to enter any Qualified Domestic Relations Orders or amendments thereto. The parties shall cooperate and provide all relevant and necessary documents for such Qualified Domestic Relations Orders

1.11 Except for the items expressly conferred or addressed as set forth hereinabove or

  
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as otherwise expressly provided by this Agreement, each party shall have exclusive ownership of all items of personal property that are currently in his or her possession, and the other party waives and releases any and all claim or interest in such items.

1.12 The Husband shall transfer the 2009 Prius to the oldest daughter, Anna, within thirty days of the execution of the Final Judgment.

#### **Division of Liabilities**

1.13 The parties agree that each shall be liable for their debts and obligations, including any credit card debt in their names.

1.14 No other obligations or liabilities of the parties are known to exist. Any obligation or liability that is not listed herein shall be the responsibility of the party that incurred the same, and the party that incurred the same shall indemnify the other party and the property of the other party harmless from liability therefor.

1.15 Neither party shall hereafter incur any obligation or liability for which the other party will be liable.

#### **Beneficiary Designation**


1.16 Wife and Husband agree that the designation providing for the payment or transfer at death of interest in the assets set forth below to or for the benefit of the deceased's party former spouse **SHALL BE VOID** as of the date of entry of the Final Judgment of Dissolution of Marriage.

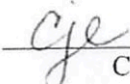
#### **General Provisions**

1.17 Full and Complete Disclosure. Each party hereto warrants and agrees that he or she has fully and completely disclosed all marital and nonmarital property, income, assets, and liabilities to the other party.

1.18 Other Information or Instruments. Each party agrees to provide the other party with any necessary information or to execute and/or deliver any instrument or document necessary to transfer title or interest in property consistent with this Agreement.

1.19 Nondischargeable in Bankruptcy. All terms of this Agreement pertaining to the division of marital property, including but not limited to any hold harmless or indemnification provisions, are specifically intended by the parties to be nondischargeable in the event of bankruptcy.

  
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**ARTICLE II  
ALIMONY**

2.1 The Husband and Wife both waive the right to alimony or support from the other. Said alimony waivers shall release the other party from any and all forms of alimony, including, but not limited to, temporary alimony, durational, bridge-the-gap alimony, rehabilitative alimony, and lump sum alimony from now until the end of time. There shall be no modification of this waiver for any reason, whether known, unknown, foreseen, or unforeseen, from now until the end of time.

2.2 Health Insurance. Each party is responsible for obtaining and paying for their health insurance upon entering the Final Judgment. The parties are responsible for their insurance, including premiums, deductibles, co-pays, prescriptions, and any other out-of-pocket costs not covered by the insurance.

**ARTICLE III  
TAX ISSUES**

**Federal Income Taxes for Tax Year 2023**

3.1 The Husband and Wife have already filed and paid their 2023 Taxes. Each party shall indemnify and hold the other party harmless for such taxes, liabilities, deficiencies, assessments, penalties, or interest due thereon or the omission of taxable income or claim of erroneous deductions of the appropriate party. Each party shall indemnify and hold the other party harmless for such taxes, liabilities, deficiencies, assessments, penalties, or interest due thereon or the omission of taxable income or claim of erroneous deductions of the appropriate party.

3.2 The parties agree that nothing contained herein shall be construed as or is intended as a waiver of any rights that a party has under the "Innocent Spouse" provisions of the Internal Revenue Code.

3.3 The Wife shall receive ½ of the available carry loss forward the parties have incurred, which is currently \$7,958.00.

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3.4 Beginning in 2024, each party shall file separate tax returns for each year thereafter.

#### **Other Provisions**

3.5 Attorney is Not Tax Expert. The parties acknowledge that any attorney involved with this Agreement does not claim to be an expert in tax matters. Each party states that he or she has consulted or has had the opportunity to consult with a tax professional to evaluate this Agreement's tax implications and consequences fully.

3.6 Request for Information and Cooperation. It is agreed that each party shall provide any information reasonably necessary to prepare federal income tax returns within thirty (30) days of receipt of a written request. Each party shall reasonably cooperate with the other in the preparation of income tax returns as set forth hereinabove. Within five days of receipt of written notice from the other party, each party will allow the other party access to these records in order to respond to an IRS examination or request for information. Purposes for which access to such records will be granted includes, but is not limited to, the determination of acquisition dates or tax basis, and such access shall include the right to copy the records.


3.7 Preservation of Information. Each party shall preserve for a period of seven years from the date of the filing of the applicable tax return, all financial records relating to the marital property. Each party shall preserve indefinitely any records that determine or affect the tax basis in any marital property.

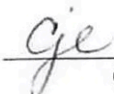
3.8 No Waiver of "Innocent Spouse." The parties agree that nothing contained herein shall be construed as or is intended as a waiver of any rights that a party has under the "Innocent Spouse" provisions of the Internal Revenue Code.

#### **ARTICLE IV COURT COSTS AND ATTORNEY'S FEES**

4.1 The parties shall bear their own costs of any attorneys' fees and/or costs incurred in the dissolution process, including any fees and costs incurred after this Agreement's execution.

#### **ARTICLE V CONFIDENTIALITY**

  
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5.1 The parties hereto agree that, due to the private nature of the personal and financial information of the parties, the contents of this Agreement and the pleadings, in this case, are confidential and shall not be disclosed to a third party, except to a third party with whom a party has a strictly confidential relationship, such as an attorney, psychologist, accountant, or the like, or by court order.

## ARTICLE VI GENERAL PROVISIONS

6.1 Written Notice of Change of Information. Any parent shall give written notice to the other party (and, if paying child support through the State Disbursement Unit, to the State Disbursement Unit) by registered or certified mail of any intended change in the following information: (a) name, (b) marital status, (c) residence address, (d) mailing address, (e) home telephone number, (f) name of employer, (g) address of employment, or (h) work telephone number. Such written notice must be provided no later than thirty and no tenths (30) days before a change of any of the foregoing information; provided, however, if the party does not know or could not have known of the change in sufficient time to provide such prior notice, the party shall provide written notice of the change on or before twenty-four (24) hours after the party learns of the change. The parent shall also notify the Court in writing within seven (7) days of any changes.

6.2 Mutual Release. Except as provided in this Agreement, each party hereby releases and forever discharges the other of and from all causes of action, claims, rights, or demands whatsoever, in law or in equity, which either of the parties hereto ever had, or now has, against the other except any and all cause or causes of action for divorce or separation action now pending or hereafter brought by the other.

6.2.1 Except as may be provided for either party in this Agreement, each party releases and relinquishes to the other any and all rights of dower, curtesy, homestead, spouse's statutory share or inheritance, or to act as Personal Representative of the other party's estate, as well as any other right or rights that they may now or hereafter have in the other party's real or personal property or estate by reason of the marriage relation, during the other party's lifetime or after the other party's death, and shall execute, acknowledge, and deliver, at the request of the

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other party or their legal representative, without cost or expense to the other party, all such instruments as may be necessary to effectuate this release.

6.2.2 The failure of a party to insist on strict performance of any of the provisions of this Agreement is not a waiver for the future of those provisions, which shall continue in full force and effect.

6.3 Resolution of Future Disputes. In the event of any disagreement regarding an issue between the parties, the parties shall first confer and exercise reasonable efforts to resolve such a dispute. Except in an emergency, before a party files legal action regarding an issue of any such dispute or modification of any terms and conditions of this Agreement, that party shall make a good faith attempt to submit the dispute or controversy to mediation.

6.4 Reconciliation. In the event of a reconciliation or resumption of marital relations, this Agreement or its provisions shall not be abrogated in any way without further written agreement of the parties.

6.5 No Oral Agreements / No Premarital Agreement. The parties agree that this Agreement constitutes the entire agreement of the parties and supersedes any prior understandings or agreements between them. There are no representations, warranties, or oral agreements other than those expressly set forth herein.

6.6 No Waiver of Breach. The failure of a party to insist on strict performance of any provision of this Agreement shall not be construed to constitute a waiver of a breach of any other provision or of a subsequent breach of the same provision.

6.7 Severability. This Agreement is severable, and if any term or provision is determined to be unenforceable, this shall not render the remainder of the Agreement unenforceable.

6.8 Other Acts. Each party agrees to timely perform such other acts that are reasonably necessary or that may be reasonably requested by the other party to effectuate the provisions of this Agreement.

6.9 Authorship: If any dispute arises respecting the construction or interpretation of this Agreement, the Agreement shall be deemed to have been drafted and prepared by both parties.

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6.10 Paragraph Headings: Paragraph headings are provided for convenience in locating paragraphs and are not intended to add or detract anything from the clauses' language in the paragraphs.

6.11 Copies: The parties agree that this Agreement shall be signed in original form and one or more copies. Further, the parties agree when the copies are executed with the same formality and in the same manner as the original Agreement, said copies shall constitute duplicate original Agreements.

6.12 Non-Disparagement/Defamation: Neither party shall make any defamatory comments or remarks as defined by law, in writing, orally, or electronically, about either party or the companies in which the parties own interest.

6.13 Survival of Agreement; No Merger. This Agreement may be offered into evidence by either party in an action for dissolution of marriage and may be incorporated by reference in a final judgment entered therein. Notwithstanding incorporation, this Agreement shall not be merged in such judgment but shall survive the judgment and be binding on the parties.

6.14 Remedies for Enforcement. The terms and provisions of this Agreement are enforceable in the contract, in addition to any remedies for enforcement that may also be available under any final judgment of dissolution of marriage entered between the parties. If either party seeks to enforce the terms of this Agreement or hold the other party in default of his or her obligations hereunder, then the party in default shall be liable to the non-defaulting party for all reasonable expenses incurred, including reasonable attorneys' fees in the enforcement of the obligations created by this agreement. In addition, each party agrees that a Court of competent jurisdiction may impose upon the defaulting party, after notice and hearing, any sanctions, including contempt.

6.15 Discovery and Waiver: Husband and Wife each declare that he or she is fully informed and cognizant of the income, property, estate, and other assets and that there has been full and complete disclosure made to the other of same and further declares his or her complete satisfaction that such disclosure is true, correct, complete, and made in good faith. The parties represent that they have fully and fairly complied with mandatory financial disclosure requirements pursuant to Florida Family Law Rule of Procedure 12.285. The parties have also filed their respective financial affidavits. The parties specifically waive additional financial

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disclosure and discovery. However, this waiver of further discovery does not extend to the right to file, take discovery in, or obtain appropriate relief in any future motion or proceeding based on any act of fraud or misrepresentation in the identification of assets or liabilities as reflected in each party's financial affidavit.

6.16 Representation by Counsel. The parties represent to each other that both parties understand that Ryan M. Tarnow, Esq and McLaughlin & Stern PLLC, a law firm whose attorneys are licensed to practice law in the State of Florida, has represented the Husband in the negotiation and execution of this Agreement Niki T. Marshall, Esq. and Marshall Law, a law firm whose attorneys are licensed to practice law in the State of Florida, has represented the Wife in the negotiation and execution of this Agreement.

6.17 Each party fully understands the facts as to his or her legal rights and obligations. Each executes this Agreement freely and voluntarily, intending to be bound by it.

6.18 Each party has fully disclosed his or her assets and current financial condition to the other.

6.19 Each party understands that this Agreement constitutes the entire contract between the parties and supersedes any prior understanding or agreement. There are no representations or warranties other than those set forth in this Agreement.

6.20 The parties understand that all matters set forth herein shall continue to be binding unless agreed to otherwise in writing.

6.21 Each party has given careful and mature thought to the making of this Agreement.

6.22 Each party has carefully read the provisions of this Agreement.

**SIGNATURE PAGE FOLLOWS**

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SIGNATURE PAGE

I, CHARLES A. ELLIS, certify that I have been open and honest in entering into this Agreement. I am satisfied with this Agreement and intend to be bound by it.

Dated: June 13, 2024

*Charles A. Ellis*

CHARLES A. ELLIS

Witnesses as to CHARLES A. ELLIS:

*Alisha Mangar*

Signature of Witness

6/13/2024

Date

Alisha Mangar

Name Printed

525 Okeechobee Blvd., Ste 1700

Street Address

West Palm Beach, FL 33401

City, State, Zip

*Daysi Blanco*

Signature of Witness

6/13/24

Date

Daysi Blanco

Name Printed

525 Okeechobee Blvd, Ste. 1700

Street Address

West Palm Beach, FL 33401

City, State, Zip

STATE OF FLORIDA  
COUNTY OF Palm Beach

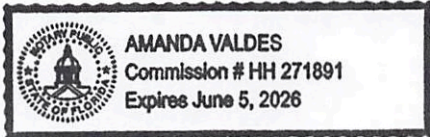
Sworn to or affirmed and subscribed before me, by means of  physical presence or [ ] online notarization, on June 13, 2024 by CHARLES A. ELLIS.

*Amanda Valdes*

NOTARY PUBLIC - STATE OF FLORIDA

Amanda Valdes

Printed Name of Notary



Personally known  
 Produced identification  
Type of identification produced FLDL

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I, CATHERINE J. ELLIS, certify that I have been open and honest in entering into this Agreement. I am satisfied with this Agreement and intend to be bound by it.

Dated: June 13, 2024

Catherine J. Ellis  
CATHERINE J. ELLIS

Witnesses as to CATHERINE J. ELLIS:

_____	_____
Signature of Witness	Signature of Witness
_____	_____
Date	Date
_____	_____
Name Printed	Name Printed
_____	_____
Street Address	Street Address
_____	_____
City, State, Zip	City, State, Zip

STATE OF FLORIDA  
COUNTY OF Palm Beach

Sworn to or affirmed and subscribed before me, by means of  physical presence or  online notarization, on June 13, 2024 by CATHERINE J. ELLIS.

Sarah Lambie  
NOTARY PUBLIC - STATE OF FLORIDA



SarahLambie  
Printed Name of Notary

\_\_\_\_ Personally known  
 Produced identification  
Type of identification produced FLDL

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Catherine Ellis v. Charles Ellis

50-2023-DR-000557  
Schedule of Net Worth

Binder Tab	Date of Marriage: 04/23/1988		Date of Filing: 08/22/2023		Most Current		Proposed Plan of Equitable Distribution				
	Description	Acct #	Titled	8/22/2023	As of	Total	As of	Non-Marital	Marital Value	Wife	Husband
<b>Cash &amp; Cash Equivalents:</b>											
1	Capital One	8691	H	-	6/30/2023	-	3/31/2024	-	-	-	-
2	Capital One	4031	H	3	6/30/2023	3	3/31/2024	3	3	-	3
3	Capital One	4346	H	234,277	6/30/2023	233,254	3/31/2024	233,254	233,254	116,627	116,627
4	Velocity Credit Union	2370-51	J	5,102	8/31/2023	5,107	4/30/2024	45,198	5,107	2,554	2,554
5	Velocity Credit Union	2370-52	J	114,574	8/31/2023	45,198	4/30/2024	5,140	45,198	22,599	22,599
6	Velocity Credit Union	2370-57	J	5,113	8/31/2023	5,140	4/30/2024	100	5,140	2,570	2,570
7	Velocity Credit Union	0000-51	H		Opened after DOF	107,285	3/31/2024	107,285	100	-	-
8	Velocity Credit Union	0000-52	H			107,285	4/1/2024	107,285	-	-	-
9	Velocity Credit Union	0000-58	H			-	3/31/2024	-	-	-	-
10	Seacoast	1696	J	1,713	8/22/2023	2,597	5/3/2024	3,983	2,597	1,299	1,299
11	Chase	1755	W	1,500	8/25/2023	5,483	6/11/2024	3,233	1,500	1,500	-
12	Optum Bank HSA	5611	H	170,155	7/31/2023	195,113	3/31/2024	3,233	191,880	95,940	95,940
13	Seacoast	9866	H		Acct Closed				Acct Closed		
14	Seacoast	2192	H	3,992	8/22/2023	3,197	3/31/2024	3,197	3,197	-	3,197
<b>Total Cash &amp; Cash Equivalents</b>				<b>536,429</b>		<b>602,477</b>		<b>114,601</b>	<b>487,876</b>	<b>243,088</b>	<b>244,788</b>
<b>Brokerage Accounts:</b>											
15	USAA - Atec - \$305k principal	6999-01	C	458,357	9/8/2023	496,789	5/7/2024		496,789	496,789	-
16	USAA - 529 - Anna - \$50k principal	6999-02	C	68,677	9/8/2023	74,436	5/7/2024		74,436	74,436	-
17	USAA - 529 - Amelia - \$5k principal	6999-03	C	6,372	9/8/2023	6,815	4/23/2024		6,815	6,815	-
Less: Taxes				(58,820)		(69,773)			(69,773)		
18	Etrade - Includes H inheritance - Father 2015 house proceeds - #0877 now # 5777	0877	H	1,190,586	8/31/2023	1,300,826	4/30/2024	537,163	763,663	763,663	-
19	Fidelity	8856	H	1,047	8/31/2023	954	3/31/2024		954	954	-
20	Exelon - sold 11.1.2021		J		Sold						
21	Johnson & Johnson - 2 shares		J		Sell & Split 50/50						
22	Synnex - 5 shares		J		Sell & Split 50/50						
23	Merck - sold 3.10.23		J		Sold						
24	Ameriprise - 2 shares		J		Sell & Split 50/50						
25	Concentrix - 5 shares		J		Sell & Split 50/50						
26	Brookfield Infrastructure Partners LP - .0002%		H		Sell & Split 50/50						
27	US Savings Bond - 2		H	47,000	Cash out value	48,385	6/1/2024		48,385	48,385	-
28	US Savings Bond - 1		W	6,000	Cash out value	6,314	6/1/2024		6,314	6,314	-
29	US Savings Bond - 2		C	310		661	5/1/2024	661	-	-	-
<b>Total Brokerage Accounts</b>				<b>1,719,529</b>		<b>1,885,407</b>		<b>537,824</b>	<b>1,327,583</b>	<b>514,581</b>	<b>813,002</b>
<b>Retirement Accounts:</b>											
30	Capline Retirement Savings Account (401k)		H	69,752	9/30/2023	86,160	3/31/2024		86,160	86,160	-
31	Fidelity - GE Retirement Savings Account (401K)		H	437,503	6/30/2023	641,465	3/31/2024		641,465	341,465	341,465
32	Vanguard - Chromalloy 401k Plan	2270	H	665,314	6/30/2023	807,043	3/31/2024	418,398	388,645	388,645	-
33	Vanguard - Rollover IRA	7401	H	392,505	8/31/2023	418,453	3/31/2024		418,453	418,453	-
34	Vanguard - Traditional IRA	8332	H	143,114	6/30/2023	158,910	3/31/2024		158,910	158,910	-
35	Vanguard - Roth IRA	7512	H	10,650	6/30/2023	12,717	3/31/2024		12,717	12,717	-
36	Vanguard - Roth IRA	0320	W	19,935	8/31/2023	21,340	6/11/2024		21,340	21,340	-
37	Vanguard - Traditional IRA	9053	W	141,406	9/30/2023	178,588	6/11/2024		178,588	178,588	-
38	RTX Savings Plan - 1982		W	871,034	9/22/2023	1,092,394	6/11/2024	179,547	912,847	912,847	-
39	Pratt Whitney/UTC/Raytheon Pension Service Center - \$979/mth		W								

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**WIFE'S PERSONAL PROPERTY FROM MARITAL HOME**

Christmas ornaments  
Homemade wreaths  
Photos - under bed, on walls, school, in frames

**Anna's bedroom**

Bed  
Desk  
Dresser

**Alec's room**

Brass bed  
Dresser  
Coat rack  
Artwork in closet  
Sewing machine  
Folding wood chair

**Amelia's room**

Dresser  
First bedroom  
Cedar chest  
Dresser  
Sofa  
Bar stool (belt seat)  
Framed "dolls" from my g'ma

**Computer room**

Mac computer  
Printer  
Small file cabinet (closet)

**Front hallway**

Hall table and matching mirror

**Family room**

Marble top end table & lamp  
Stereo system  
Baskets on shelves

**Living room**

Piano  
Table Anna made  
Floor lamp with shells  
London, Paris prints

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Rose art by Sally Smith  
WIFE'S PROPERTY, CONTINUED

Master bedroom

Painted fan  
Framed doilies  
Afghan made by Aileen  
Engineer clock  
Wrought iron table, plus matching one in laundry room and 4 chairs

"Play" room

Photos and baby stuff  
Small table with shelf under  
Bookshelf and books

Dining room

Glass dishes  
Great Aunt Jeanne's fruit dishes  
Copper cookware and bowl  
3 small copper vases, pitchers  
Cookie jars (cat, apple)  
Christmas gingerbread plates  
Kid ceramic creations  
Some German "coffee" cups

Kitchen

Breville and all coffee stuff  
Cutco knives  
Pyrex containers and bowls

Outside

Cement bench by water

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