

NO. DF-24-18010

**IN THE MATTER OF
THE MARRIAGE OF**

**GWENDOLYN ULIJASZ-MCKEMIE
AND
JASON MCKEMIE**

**§ IN THE DISTRICT COURT
§
§
§ 254th JUDICIAL DISTRICT
§
§ DALLAS COUNTY, TEXAS**

UNSWORN INVENTORY & APPRAISEMENT OF JASON MCKEMIE

RESERVATIONS AND QUALIFICATIONS

Respondent, Jason McKemie, hereby reserves the right to amend and/or correct this inventory to insert any items inadvertently not mentioned or incorrectly valued as more information becomes available. All values stated in this inventory are estimates as of this time.

Respondent, Jason McKemie, files this inventory without waiving the right to challenge the accuracy of any and all inventories filed by Petitioner, Gwendolyn Uljasz-McKemie. Respondent, Jason McKemie, further expressly reserves the right to change the classification of any of the property listed herein from community to separate dependent upon facts developed by discovery or trial of this case and in no instance shall this inventory be construed as an admission against interest or as judicial admission to characterization of such property as community or separate, and that such determination is a matter of law to be decided by the Court.


Verification

I, Jason McKemie state that, to the best of my knowledge and belief, this inventory and appraisal contains—

1. a full and complete list of all properties that I claim belong to the community estate of me and my spouse, with the values thereof;
2. a full and complete list of all properties in my possession or subject to my control that I claim or admit are my or my spouse's separate property and estate, with the values thereof; and

3. a full and complete list of the debts that I claim are community indebtedness.


Any omission from this inventory is not intentional but is done through mere inadvertence and not to mislead my spouse. There may be other assets and liabilities of which my spouse is aware, and the omission of those items from this inventory should not be construed as a waiver of my interest in them.


Jason McKemie (Feb 24, 2025 15:23 CST)

Jason McKemie

My name is Jason McKemie, my date of birth is April 8, 1976, and my address is 539 W. Commerce St., Suite 2010, Dallas, Texas 75208, United States. I declare under penalty of perjury that the foregoing is true and correct to the best of my knowledge and belief.

Executed in Dallas County, Texas on February 24, 2025.


Jason McKemie (Feb 24, 2025 15:23 CST)

Jason, McKemie, Declarant

Jason McKemie






2025-02-24 Unsworn Inventory and Appraisalment of Jason McKemie

Final Audit Report

2025-02-24

| | |
|-----------------|--|
| Created: | 2025-02-24 |
| By: | Betty Villarreal (betty@webbfamilylaw.com) |
| Status: | Signed |
| Transaction ID: | CBJCHBCAABAA5zwcVPD4FQa4_us28IWxAsoGNRNwrAWP |

"2025-02-24 Unsworn Inventory and Appraisalment of Jason McKemie" History

-  Document created by Betty Villarreal (betty@webbfamilylaw.com)
2025-02-24 - 8:56:41 PM GMT
-  Document emailed to Jason McKemie (jmckemie@mckemie.net) for signature
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-  Document e-signed by Jason McKemie (jmckemie@mckemie.net)
Signature Date: 2025-02-24 - 9:23:31 PM GMT - Time Source: server
-  Agreement completed.
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In the Matter of the Marriage of Gwendolyn Ulijasz-McKemie and Jason McKemie
Cause No. DF-24-18010, 254th Judicial District Court, Dallas County

| Inventory and Appraisalment of Jason McKemie | | | | | |
|--|--|---------------|-------------|------------------|---|
| Line # | Community Property | Style/Control | As of Date | Total Value | Source |
| | Assets | | | | |
| | Bank Accounts | | | | |
| 1 | (G) Chase Sapphire Checking *3898 | W | 10/25/24 | \$14,504 | 10/25/2024 statement screenshot |
| 2 | (G) Chase Sapphire Checking *1695 | W | | Unknown | |
| 3 | Hospitech Solutions, LLC - Checking *1603 | H | 02/01/25 | \$3,857 | statement ending 01/31/2025 |
| 4 | Gwen Checking *2372 | W | | Unknown | |
| 5 | Chase Money Market Savings *4219 | W | | Unknown | |
| 6 | USAA joint checking *9941 | H/W | 02/04/25 | \$100 | statement ending 02/04/2025 |
| 7 | Chase Checking *9072 | H | 02/24/25 | \$2,112 | current balance via Chase mobile app |
| 8 | Chase joint checking *6893 | H/W | 02/12/25 | \$536 | current balance via Wells Fargo mobile app |
| 9 | Wells Fargo Bank Ameriprise *1293 | W | 10/08/24 | \$60,000 | screenshot of wire transfer into account; current balance unknown - but this is what we know of |
| 10 | Checking *1695 | W | | unknown | |
| 11 | CapitalOne - Checking (Jason) *9520 | H | 01/31/25 | \$0 | statement ending 01/31/2025 |
| 12 | CapitalOne - Savings (Jason) *9801 | H | 01/31/25 | \$0 | statement ending 01/31/2025 |
| 13 | Total Bank Accounts | | | \$81,109 | |
| 14 | | | | | |
| 15 | | | | | |
| 16 | Retirement - AMERITRADE | | | | |
| 17 | Ameriprise Roth IRA *1133 | W | 02/24/25 | \$151,315 | current balance via Ameriprise mobile app |
| 18 | Ameriprise Roth IRA *8133 | H | 02/24/25 | \$7,108 | current balance via Ameriprise mobile app |
| 19 | Traditional IRA *2133 | W | 02/24/25 | \$297,208 | current balance via Ameriprise mobile app |
| 20 | Total Retirement - Ameritrade | | | \$455,631 | |
| 21 | | | | | |
| 22 | | | | | |
| 23 | Retirement - Other | | | | |
| 24 | Voya - Cognizant 401(k) Retirement Savings Plan | W | Nov 18 2024 | \$90,247 | screenshots of balance and text message |
| 25 | E*Trade *8274 | W | 2021 | Unknown | |
| 26 | E*Trade *5029 | W | 06/30/21 | \$86,504 | 06/2021 statement |
| 27 | E*Trade *6977 | W | 05/31/21 | \$76,139 | 05/31/2021 vesting schedule |
| 28 | E*Trade *6587 | W | 09/30/21 | \$183,107 | 09/30/2021 statement |
| 29 | E*Trade *201 | W | 06/30/24 | \$80,816 | 06/30/2021 statement |
| 30 | Cognizant Tecnology 401(k) Savings Plan | W | 08/30/24 | 0 | 08/30/2024 statement; \$87,680.15 withdrawal between 7/1 and 8/30/2024 |
| 31 | Accenture H.S.A. (2025 - Health Savings Account) | W | | Unknown | |
| 32 | AIG Inc. Incentive 401(k) | W | 04/01/24 | \$91,087 | April 2024 Ameriprise Financial Planning Docs - Page 6 |
| 33 | E*Trade Roth IRA | W | | Unknown | |
| 34 | Vanguard Roth IRA - Account | W | | Unknown | |
| 35 | E*Trade Traditional IRA | W | | Unknown | |
| 36 | Traditional IRA Account #7 | W | | Unknown | |
| 37 | Vanguard IRA Account - Gwen | W | | Unknown | |
| 38 | Total Retirement - Other | | | \$607,900 | |
| 39 | | | | | |
| 40 | | | | | |
| 41 | Vehicles | | | | |
| 42 | 2023 BMW M3 (approx. value) | W | | \$68,710 | |
| 43 | (-) loan (ITCU: Act ending 3898) - paid in full | W | | \$0 | |
| 44 | 2018 Jaguar F-Pace (approx. value) | H | | \$15,000 | |

In the Matter of the Marriage of Gwendolyn Ulijasz-McKemie and Jason McKemie
Cause No. DF-24-18010, 254th Judicial District Court, Dallas County

| Line # | Community Property | Style/Control | As of Date | Total Value | Source |
|--------|--|---------------|----------------------|--------------------|--------------------------------|
| 45 | (-) loan (approx. payoff \$19,999) | H | | (\$20,000) | |
| 46 | Total Vehicles | | | \$63,710 | |
| 47 | | | | | |
| 48 | | | | | |
| 49 | Liabilities | | | | |
| 50 | (Jason) Capital One Quicksilver One CC *9962 | H | 02/24/25 | (\$5,343) | Monarch Money screenshot |
| 51 | (Jason) USAA Rate Advantage Platinum Visa CC *5373 | H | 02/24/25 | (\$3,921) | Monarch Money screenshot |
| 52 | (Jason) US Bank Platinum CC *4563 | H | 02/24/25 | (\$4,192) | Monarch Money screenshot |
| 53 | (Jason) Chase Marriott Bonvoy Visa CC *8046 | H | 02/24/25 | (\$6,272) | Monarch Money screenshot |
| 54 | (Jason) Amazon Prime Card | H | 02/24/25 | (\$4,693.50) | Monarch Money screenshot |
| 55 | (Jason) Quicksilver One *9173 | H | 02/23/25 | (\$1,637.53) | Monarch Money screenshot |
| 56 | (Jason) Citi Aadvantage Card | H | 02/24/25 | (\$5,439.17) | Monarch Money screenshot |
| 57 | (Jason) Amazon Store Card | H | 02/24/25 | (\$1,650.97) | Monarch Money screenshot |
| 58 | (Jason) PayPal Credit | H | 02/24/25 | (\$2,424.52) | Monarch Money screenshot |
| 59 | (Jason) AUTO LOAN | H | 02/24/25 | (\$19,599.00) | Monarch Money screenshot |
| 60 | (Jason) Oil Loan | H | 02/24/25 | (\$35,000.00) | Monarch Money screenshot |
| 61 | (Gwen) American Express Personal (Loan) | H | 02/24/25 | Unknown | |
| 62 | (Jason) Hilton AMEX Credit Card *2004 | H | 02/24/25 | (\$616.58) | Monarch Money screenshot |
| 63 | (Jason) Loan - American Express Personal Loan *1001 | H | 02/24/25 | (\$3,422) | Monarch Money screenshot |
| 64 | (Gwen) American Express Platinum Card | W | 02/12/25 | Unknown | |
| 65 | (Gwen) Loan - SoFi | W | 02/12/25 | Unknown | |
| 66 | (Gwen) Wells Fargo credit card (maybe ending *3623) | W | 02/12/25 | Unknown | |
| 67 | (Gwen) CITI / Advantage Executive World Elite Mastercard | W | 02/12/25 | Unknown | |
| 68 | Total Other Items | | | (\$94,211) | |
| 69 | | | | | |
| 70 | | | | | |
| 71 | Other Items | | | | |
| 72 | Accenture Sign-On Bonus Payments | W | 11/01/24 | \$300,000 | Accenture Compensation Summary |
| 73 | Roth 401k Contributions (Aug-Dec 2024) (\$15,600/month paycheck deduction) | W | 12/31/24 | \$78,000 | |
| 74 | Accenture VEIP Program + Bonus | W | 12/31/25 | \$229,905 | Accenture Compensation Summary |
| 75 | Global Annual Bonus (31% of Annual Base Pay) | W | 12/31/25 | \$120,900 | Accenture Compensation Summary |
| 76 | Leadership New Hire Equity (RSU's - Cliff Vests @ 5 Years) | W | 11/01/24 | \$175,000 | Accenture Compensation Summary |
| 77 | Leadership Supplemental New Hire Equity (vests 1/3 over 3 years) | W | 11/01/24 | \$100,000 | Accenture Compensation Summary |
| 78 | Leadership Performance Equity Stock (34% / Vests 1/3 over 3yrs) | W | 12/31/25 | \$132,600 | Accenture Compensation Summary |
| 79 | Cognizant Expense Reimbursement (4 Payments) | W | 11/01/24 | \$67,560 | |
| 80 | Cognizant - Settlement Payment (from separation agreement) | W | 11/01/24 | \$140,441 | separation agreement (draft) |
| 81 | Advantigen Stock | H/W | | \$130,000 | Advantigen agreements |
| 82 | Cognizant - Annual Bonus | W | 12/15/24 | \$125,000 | |
| 83 | Total Other Items | | | \$1,599,406 | |
| 84 | | | | | |
| 85 | | | | | |
| 86 | Other Items | | Style Control | Value | |
| 87 | W's Personal property | | W | X | |
| 88 | H's Personal property | | H | X | |
| 89 | W's Attorney/Professional Fees in this Matter | | W | X | |
| 90 | H's Attorney/Professional Fees in this Matter | | H | X | |
| 91 | W's Memberships, frequent flyer miles, etc., if any | | W | X | |
| 92 | H's Memberships, frequent flyer miles, etc., if any | | H | X | |

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| Line # | <i>Community Property</i> | Style/Control | As of Date | Total Value | Source |
|--------|--|---------------|------------|-----------------|------------|
| 93 | Federal Income Taxes | | | | |
| 94 | | | | | |
| 95 | | | | | |
| 96 | CRYPTO/DIGITAL CURRENCY (Bitcoin, Ethereum, Litecoin, Etc.) | | | | |
| 97 | (Jason) Digital Currency Balance - Paypal Crypto | | | \$87.46 | screenshot |
| 98 | (Gwen) Digital Currancy Balance - CumRocket Crypto | | | \$15,304.00 | |
| 99 | Total Crypto Currency | | | \$15,391 | |
| 100 | | | | | |
| 101 | | | | | |
| 102 | P2P PAYMENT SERVICES | | | | |
| 103 | (Gwen) GooglePay | W | | unknown | |
| 104 | (Gwen) PayPal | W | | unknown | |
| 105 | (Gwen) ApplePay | W | | unknown | |
| 106 | (Gwen) CashApp | W | | unknown | |
| 107 | (Gwen) Venmo | W | | unknown | |
| 108 | (Jason) GooglePay | H | | \$0.00 | |
| 109 | (Jason) PayPal | H | | \$5.88 | |
| 110 | (Jason) ApplePay | H | | \$0.00 | |
| 111 | (Jason) CashApp | H | | \$0.00 | |
| 112 | (Jason) Venmo | H | | \$0.00 | |
| 113 | Total P2P Sevice Balances | | | \$6 | |