

Colorado Secretary of State
Elections Division
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Denver, CO 80290
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Below Space for Office Use Only

**RECEIVED
JAN 6, 2025
ELECTIONS
SECRETARY OF STATE**

PERSONAL FINANCIAL DISCLOSURE STATEMENT

File in accordance with the appropriate statutes. This must be submitted via email to cpfhelp@coloradosos.gov.

1-45-110(2)(a), 24-6-202, 24-21-603(2)(h), 24-51-207(4), 44-30-301(1)(g), 44-32-301(1)(g), 44-40-108(6), C.R.S.

Personal financial disclosure statements (PFD) filed for ballot access purposes must be filed within 10 days of filing a candidate affidavit unless the candidate is an incumbent and has timely filed their annual PFD or Updated statement in accordance with 24-6-202(4), C.R.S.

Judges running for retention and judges appointed to a court of record are only required to file their PFD on or before the January 10 following such retention, appointment, or election.

This statement is a public document and will be available on the Secretary of State's website. You MUST fill out this form accurately, completely, and file it timely. Failure to do so may result in one or more of the following sanctions:

- A \$50 per day late filing penalty that will accrue until the statement is filed (Art. XXVIII, Sec. 10(2)(a), Colorado Constitution and 1-45-110, C.R.S.),
- An administrative complaint that may result in civil penalties, or
- Criminal sanctions as outlined in 24-6-202(7), C.R.S.

Law enforcement offices (Attorney General, District Attorney, Judge, etc.): Should NOT list their personal contact information such as home address, phone, or email on this form. These offices may provide alternative contact information (P.O. Box, business address and phone number, or general email address).

Attach extra pages, as necessary.

Name:	Monica M. Marquez
Mailing Address: (Include city, state, and zip):	Colorado Supreme Court, 2 East 14th Ave., Denver, CO 80203
Office Held / Sought:	Colorado Supreme Court Justice
Business Phone:	(720) 625-5450
Residence/Cell Phone:	

Name:	Monica M. Marquez
Office Held /Sought:	Colorado Supreme Court Justice

Select the appropriate categories:

I am filing this disclosure because:

☐ I am filling a vacancy. ☐ I am seeking election to office ☒ This is my annual filing.

I am filing as:

☐ Office Holder/Incumbent: _____
(OFFICE/DISTRICT NUMBER)

☐ Candidate: _____
(OFFICE/DISTRICT NUMBER)

☐ State Board/Agency/Commission/Member: _____
(OFFICE)

☒ Judge: Supreme Court
(SUPREME COURT; COURT OF APPEALS; COUNTY or JUDICIAL DISTRICT, SENIOR JUDGE, and MAGISTRATE)

☐ Other: _____
(Office)

INCOME:

List the names of any sources of income, including capital gains (whether or not taxable) for yourself, your spouse, and minor children residing with you.

Recipient of Income (Individual receiving income, e.g., Self, Spouse, Minor Child(ren) #1, #2, etc.)	Source of Income (Name of Employer)	Range Amount (E.g., Between \$30,000 and \$67,000)
See Attachment A		

ATTACHMENT A
MONICA M. MÁRQUEZ
PERSONAL FINANCIAL DISCLOSURE STATEMENT
JANUARY 6, 2025

INCOME:

List the names of any sources of income, including capital gains (whether or not taxable) for yourself, your spouse, and minor children residing with you.

Recipient of Income	Source of Income	Range Amount
Self	Colorado Judicial Department (employer)	Salary 2024/anticipated 2025: between \$215,000 and \$220,000
Self	Interest income – BMO money market account (closed in 2024)	Interest earned in 2024: less than \$15
Self	Interest income – BMO Alto high-yield savings account (opened in 2024)	Interest earned in 2024: between \$650 and \$750
Self	PERA 401(k)	I do not receive distributions or other taxable income from this account. In 2024, the total change in value for the 401(k) (including my employee contributions) was between \$95,000 and \$105,000
Spouse (Sheila E. Barthel)	Camping World, Inc. (employer)	Salary in 2024/anticipated 2025: between \$140,000 and \$160,000
Spouse	CloudSoda (occasional contract work)	Compensation received in 2024 was between \$1,000 and \$2,000
Spouse	Interest income – Citizens Financial Group high-yield savings account (closed in 2024)	Interest earned in 2024: between \$1,000 and \$2,000
Spouse	Interest income – BMO Alto high-yield savings account (opened in 2024)	Interest earned in 2024: between \$2,000 and \$3,000
Spouse	Transamerica 401(k)	My spouse does not receive distributions or other taxable income from this account. In 2024, investment returns were between \$10,000 and \$12,000.
Spouse	Fidelity IRA accounts (closed in 2024)	My spouse does not receive distributions or other taxable

		income from these accounts. In 2024, investment returns were between \$70,000 and \$80,000.
Spouse	Vanguard IRA accounts (including a new account), brokerage account (including DVN, HD, KD, MSTR, NVDA, PSTG, VRTX stock)	My spouse does not receive distributions or other taxable income from these IRA accounts. In 2024, investment returns were between \$70,000 and \$80,000.
Spouse	Schwab brokerage account (including TWLO stock)	In 2024, investment returns were between \$11,000 and \$13,000.
Spouse	WEX HSA account (closed in 2024)	My spouse does not receive distributions or other taxable income from this account. In 2024, investment returns were between \$4,000 and \$6,000.
Spouse	Fidelity HSA account (opened in 2024)	My spouse does not receive distributions or other taxable income from this account. In 2024, investment returns were between \$0 and \$100.

Name:	Monica M. Marquez
Office Held /Sought:	Colorado Supreme Court Justice

Sources of Compensation:

List sources of compensation exceeding \$5,000 received by you or your business affiliation for services provided directly by you during the current year and during the prior calendar year, if the source is a person or entity that is regulated by the state or pays for a lobbyist that conducts lobbying at the General Assembly or at a State Regulatory body. This includes Clients and Customers of any affiliated corporation, firm, partnership, or other business enterprise and a description of the duties performed or services rendered for each source of compensation if you directly provided the services generating a fee or payment. You may exclude any information considered confidential because of a privileged relationship recognized by law. If you withhold information because of a privileged relationship, you must disclose the existence of the source of compensation and an explanation for why information was withheld.

Recipient of Compensation (Self or business affiliation)	Compensation Source (E.g., Clients, customers, affiliated corporation, firm, partnership, or other business enterprise)	Description of Duties / Services Rendered	Explanation for withheld information (for Confidential or Privileged Relationships)
None			

Compensated Lobbying:

List the name of any person, firm, or organization for whom compensated lobbying is done by any person associated with you if the benefits of such compensation are or may be shared by you directly or indirectly.

Name of Person, Firm, Corporation, or Organization Retaining Lobbyist
None

ASSETS:

List the name of each business, insurance policy, or trust where there is a financial interest in excess of \$5,000 for yourself, your spouse, and minor children residing with you.

Who is the person with the financial interest? [E.g., Self, Spouse, Minor Child(ren)]	Name of Business, Insurance Company, or Trust
Self (primary beneficiary)	Monica M. Marquez Trust
Self (primary beneficiary)	Camping World, Inc. employer-provided term life insurance policy
Spouse (Sheila E. Barthel) (primary beneficiary)	Sheila E. Barthel Trust
Spouse (primary beneficiary)	USAA term life insurance policy
Spouse (primary beneficiary)	State of Colorado employer-provided life insurance policy

Name:	Monica M. Marquez
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Property in Colorado:

List the LEGAL description (as shown on the books of the county assessor) of all real property in Colorado (including an option to buy) in which you, your spouse, and minor children residing with you have a direct or indirect interest with a fair market value in excess of \$5,000. Property that must be listed includes residential, investment property, condominium, rental property and any mineral, water, coal, and rights to sand and gravel. STREET ADDRESSES DO NOT SATISFY STATUTORY REQUIREMENTS.

Owner of Record	Legal Description of Property
Sheila E. Barthel Trust and Monica M. Marquez Trust	Redacted by SOS

Offices, Directorships, and Fiduciary Relationships:

List all offices, directorships, and fiduciary relationships held by you, your spouse, and any minor children residing with you and include whether the position is compensated or uncompensated.

Person Holding Position	Position Held	Name of Organization or Trust	Compensation (E.g., \$500; \$1,000; \$5,000)
Self	Trustee	Monica M. Marquez Trust	\$0
Spouse	Trustee	Sheila E. Barthel Trust	\$0

Businesses Regulated by the State of Colorado:

List any businesses which you or your spouse are associated with that do business with or are regulated by the state and the nature of such business (e.g., attorney, insurance, medical profession, real estate, securities, etc.).

Person Involved (Self or spouse)	Name of Business	Nature of Business
None		

Name:	Monica M. Marquez
Office Held /Sought:	Colorado Supreme Court Justice

Liabilities:

List the name of each creditor for yourself, your spouse, and minor children living with you to whom debt is owed in excess of \$1,000. Include the interest rate and the range of amounts owed including the highest owed amount.

Person Liable for Debt (E.g., Self, Spouse, Minor Child(ren) #1, #2, etc.)	Name of Creditor	Interest Rate (%)	Debt Amount Range Owed (E.g., Between \$1,000 and \$5,000)
Self and Spouse	Cardinal Financial, LP d/b/a	2.125% 10-year fixed	Debt amount owed in 2024:
	Sebonic Financial (home mortgage)		between \$145,000 and \$180,000

Additional Information:

List below any additional information you would like to disclose. Attach extra pages, as necessary.

Please see Attachment A for list of sources of income.

Filing of Tax Returns:

Any person subject to the provision of 24-6-202, C.R.S. may elect to file copies of federal income tax return(s) along with a certified statement of any investments held by you, your spouse, and minor children residing with you which are not reflected by the income tax return(s) in lieu of complying with the provisions of subsections (1) to (4) of 24-6-202, C.R.S. *Submitted tax returns and statements are public information. Any information required on this form that is NOT included in a federal income tax return must be added to this form.*

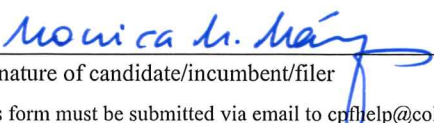
Note: Within 30-days after any termination or acquisition of interests you must file an amended Personal Financial Disclosure (PFD) statement. You may resubmit this form or use the *Personal Financial Disclosure Statement-Update* form.

Affirmation:

I affirm and certify, under penalty of perjury, that the information provided in this disclosure statement is true, complete, and correct to the best of my knowledge and belief.

Monica M. Marquez

Print name of candidate/incumbent/filer


Signature of candidate/incumbent/filer

Date: 1/6/25

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