

IN THE CIRCUIT COURT OF THE NINTH JUDICIAL CIRCUIT
IN AND FOR ORANGE COUNTY, FLORIDA

IN RE: The Marriage of:

BRIAN ZIMMER,
Petitioner,
and

Case No.:

MCKENZIE ZIMMER,
Respondent.

_____ /

NOTICE OF FILING

COMES NOW, the Petitioner, BRIAN ZIMMER, by and through the undersigned attorney, and files the **attached** Equitable Distribution Worksheet.

DATED this 05 day of March, 2025.

/s/ David T. Roberts

David T. Roberts

Attorney for Petitioner

Florida Bar No. 0079596

The Roberts Family Law Firm, P.A.

823 Irma Avenue

Orlando, Florida 32803

PleadingsB@RobertsFamilyLawFirm.com

Telephone: (407) 426-6999

Facsimile: (407) 872-2266

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true and correct copy of the foregoing has been served by Email, U.S. Mail, Hand Delivery, or Personal Process Server to the following this 05 day of March, 2025:

McKenzie Zimmer
2540 Hempel Cove Court
Windermere, Florida 34786
Mackz24@outlook.com

/s/ David T. Roberts

David T. Roberts
Attorneys for Petitioner

ZIMMER v. ZIMMER**PROPOSED EQUITABLE DISTRIBUTION**

Date of Marriage: 08/09/2013

DRAFT as of 10/29/2024

Ref	Asset/Liability	Ownership	Account Number / Description	Date	Amount	Split	To Husband	To Wife
CASH:								
1	Chase Checking	H	...8689	07/31/2024	\$ 3,050	Equal	\$ 1,525	\$ 1,525
2	Chase Checking	J	...9607	07/31/2024	\$ 3,951	Equal	\$ 1,976	\$ 1,976
3	Chase Savings	H	...8832	07/31/2024	\$ 4,914	Equal	\$ 2,457	\$ 2,457
4	Optum Bank HAS	H	...7131	09/30/2024	\$ 415	Equal	\$ 207	\$ 207
INVESTMENTS:								
5	Fidelity	H	...9708	07/31/2024	\$ 207,974	Equal	\$ 103,987	\$ 103,987
6	Robinhood	H	...9006	07/31/2024	\$ 852	Equal	\$ 426	\$ 426
7 a	Vanguard	H	...2906	07/31/2024	\$ 47,030	To H	\$ 47,030	\$ -
7 b	LESS Tax Withdrawl	H			\$ (23,000)	To H	\$ (23,000)	\$ -
BUSINESS INTERESTS:								
8 a	Level One PLLC			See below		Equal	See below	See below
8 b	Chase Checking	H	...6958	04/30/2024	\$ 19,151	To H	\$ 19,151	\$ -
8 c	Chase Savings	H	...0226	04/30/2024	\$ 20,238	To H	\$ 20,238	\$ -
8 d	Nutex Health (4% interest)	H	Purchase Agreement	12/13/2023	\$ 256,000	To H	\$ 256,000	\$ -
8 e	Pinnacle Bank	H	Settlement Statement	07/10/2024	\$ (287,081)	To H	\$ (287,081)	\$ -
RETIREMENT PLANS:								
9	Financial Designs IRA	H	...2903	07/31/2024	\$ 236,922	% Split	\$ 118,461	\$ 118,461 (1)
10	Financial Designs 401(k)	H	...5633	07/31/2024	\$ 103,672	Equal	\$ 51,836	\$ 51,836
11	Financial Designs IRA	W	...2905	07/31/2024	\$ 60,375	Equal	\$ 30,188	\$ 30,188
12	Financial Designs	H	...5578	07/31/2024	\$ 324,898	Equal	\$ 162,449	\$ 162,449
13	Vanguard IRA	H	...7321	06/30/2024	Premarital	To H	Premarital	\$ -
14	SCP Health 401 (k)	H	...1480	09/30/2024	\$ 932	Equal	\$ 466	\$ 466
	LESS tax effect on all retirement plans (estimated at 20%)				\$ (145,173)		\$ (72,587)	\$ (72,587)
15	Financial Designs Roth IRA	H	...0549	07/31/2024	\$ 18,057	Equal	\$ 9,029	\$ 9,029
LIFE INSURANCE CASH VALUES:								
16	N/A			N/A		Equal	N/A	N/A

Initial

BE

