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CANDIDATE/INCUMBENT FINANCIAL DISCLOSURE STATEMENT

City of Boulder Form 13-2-3, BRC, 1981

☐ Candidate
☐ Incumbent

☐ Within 3 days of Candidate's Petition is Certified
☐ Annual April 15 filing with changes
☐ Annual April 15 filing – no changes since last filing of this statement

LISA ANN MORGAN MORZEL
Print Full Legal Name

2155 POPLAR AVE.
Address

City: Boulder | State: CO | Zip 80304

The information contained in this filing is true and correct to the best of my knowledge.

Lisa Ann Morgan Morzel | 8/4/2015
Signature of Candidate or Incumbent | Date Submitted

EMPLOYER

- If you are self-employed, or employed as a partner in a professional firm, so state, and state trade or business names you use and the name of the professional firm you work with.
- If you have more than one job during the present calendar year, state all your employers.
- If you are a homemaker, so state.
- If you have no employment, so state.

RETIRED SCIENTIST EMERITUS
CITY OF BOULDER - CITY COUNCIL

OCCUPATION

State your occupation.

- If retired or unemployed, state your occupation when you were working.
- If you are a student or a homemaker, so state.
- If you have more than one occupation, state all of them.
- If you have a profession or skill which you have used in the past, but are not now using in your job, you may state that additionally.

RETIRED - RESEARCH GEOLOGIST - US GEOLOGICAL SURVEY

SOURCE OF INCOME

State the type and source of any other income in excess of one thousand dollars during the twelve months preceding the date of filing, *besides your employer*. Each source of income must be listed, regardless of its tax status. Sources must be listed specifically; that is, *stocks* would be insufficient; you must state *stock in XYZ Company*. The type of income can be stated generally; *capital gain, dividend, rent,* etc. You are not required to disclose the amount of income from any source, but you may if you wish. If you are self-employed state the source of any other income in excess of one thousand dollars that you received during the twelve months preceding the date of filing. **Note:** Do not disclose the names of clients or others to whom you have a legal duty of confidentiality without their permission. A legal duty of confidentiality is one in which you could invoke the right to refuse to answer a question under oath in a trial, like a lawyer-client privilege.

Source	Type
rental income	rent
H&R Block Inc., Commerce Bankshares	stocks
ICMA-RC	457 deferred compensation

BUSINESS INTERESTS

State the name, location, and nature of activity of any business entities or enterprises for profit, with holdings of real or personal property or with business dealings in the area encompassed by the Boulder Valley Comprehensive Plan (BVCP), in which you have any financial interest, or in which you are actively engaged as an officer, director, or partner.

For each, state the nature of your interest or activity therewith, and state whether you have controlling interest in the entity. *Business entity* means any type of business: sole proprietorship, joint venture, partnership, corporation, trust holding or investment company, professional corporation, etc. It is immaterial whether the business is making money; if it was founded with that intent, it must be listed. Also, note that the business must be listed if it has any property, or any business dealings, within the BVCP, but that those holding and dealings do not have to be set forth (real estate holdings of businesses in which you have a controlling interest must be disclosed in the next question, however). The nature of your involvement should be stated with a degree of specificity; that is, state *corporate vice president* rather than simply *officer*. The amount of financial involvement need not be disclosed, but you may if you wish.

Organization's Name	Nature of Activity of Business	Controlling Interest
LISA MORZEL	rental	☑ YES ☐ NO
Address: 910 PORTLAND PL. #25	Nature of Your Interest in Business	
City: BOULDER State: CO Zip: 80304	owner	
Organization's Name	Nature of Activity of Business	Controlling Interest
		☐ YES ☐ NO
Address	Nature of Your Interest in Business	
City State Zip		
Organization's Name	Nature of Activity of Business	Controlling Interest
		☐ YES ☐ NO
Address	Nature of Your Interest in Business	
City State Zip		

REAL ESTATE INTERESTS

State the location of any real property within Boulder County in which you, or the business entities you have a controlling interest in, have any interest. Also state the nature of your or your business entity's interest. All interests, including options, remainders, mineral rights, etc., no matter what their value, must be listed. You need not state the value of the interest, but you may do so if you wish.

Note: If there is no street address, state the lot number and subdivision. If none, state the size of the parcel, the quarter section it is in, and the recording number of other place where the legal description can be found.

Owner's Name	INTEREST OWNED BY
LISA MORZEL	☒ Self
Street Address: 2155 POPLAR AVE.	☐ A trust of which I am a beneficiary
City: BOULDER State: CO Zip: 80304	☐ A business entity I control/manage
Owner's Name: LISA MORZEL	INTERESTED OWNED BY
	☒ Self
Street Address: 910 PORTLAND PL. #25	☐ A trust of which I am a beneficiary
City: BOULDER State: CO Zip: 80304	☐ A business entity I control/manage
Owner's Name	INTERESTED OWNED BY
	☐ Self
Street Address	☐ A trust of which I am a beneficiary
City State Zip	☐ A business entity I control/manage

OTHER INFORMATION

State any other information which you feel would be helpful or should be disclosed. If there is no such information, write ***none***.

None

☐ I have attached additional sheets for information that exceeded the space provided on this form.

____ Number of Additional Pages.