
From: Valeria Chomsky <[REDACTED]>
Sent: Tuesday, October 17, 2017 3:59 PM
To: jeffrey E.
Subject: Previous request that was denied

=div dir="ltr">This was the previous request and how it ended>

From: [REDACTED] <[REDACTED]>, Dian Chomsky <[REDACTED]>
<mailto:[REDACTED]>
Date: C2 [REDACTED] 19/04/2017 14:55
Subject: Re: taxes

You are the trustee for the marital trust, not for my assets. We are in charge of our assets. There are no mixed signals.

As I have explained, the marital trust was set up many years ago on the assumption that the funds would be available both to Carol and me, and to the survivor -- which we took for granted would be Carol, which is why it is in her name. After I appointed you as trustee a few years ago, you certainly have the legal right to determine whether funds should be available, even for partial tax payments as in this case.

I am indeed surprised, in fact shocked, that you feel that you cannot permit a small payment from the marital trust -- even less that what I was providing annually as distributions and for Alex's health care -- without insisting on some professional supervision of my financial affairs. It of course never would have occurred to me over the years to ask for anything similar.

That is the sole issue. Nothing else. We take care of our own financial affairs, just as you do of yours. It is no one else's concern. The marital trust, and that alone, is your proper concern, since the time when I appointed you as trustee. I will not ask for anything further from the marital trust, and there is no reason for you to ask again to be harrassed. I wrote:

Dear Doddoy,

It sounds like you are very angry about my decision yesterday, and I'm deeply sorry that it has come to this. I still hope that we can sit down at a meeting someday and resolve this. I'd like to use the funds from the marital trust to support you, but I can't do that without some understanding of your overall financial picture. If we were to meet with any professional advisor of your choosing I'm confident we could work out a plan that ensures your long-term security and comfort, helps Valeria after your death, and uses the marital trust in a way that we both agree is reasonable and sustainable. It would be up to you how much detail to share with me at this meeting and how much to keep private. The more I understand your circumstances, the better I can fill my role as trustee.

You are sending me mixed signals about whether you want me involved in your financial affairs or not. Several times you've declared that your own IRA is plenty, you are managing fine without using the marital trust, and you don't want to discuss it with me anymore. But yesterday you came to me out of the blue, demanded a six-figure sum on three hours' notice, and reacted angrily when I insisted on taking time to discuss it first. You can't have it both ways. I am the trustee for part of your assets, like it or not, and you have to decide whether to include me in a genuine ongoing conversation (with professional advice) about your finances, or forgo your access to this money. I'd like to know which it is going to be. Please don't ask for further trust distributions until we have begun a conversation. I will be ready for the conversation anytime you like.