
From: jeffrey E. <jeevacation@gmail.com>
Sent: Tuesday, October 17, 2017 9:37 PM
To: Valeria Chomsky
Subject: Re: Noam - IRA RMD and Distribution Inquiry - Information

they are pointing out the minimum required distribution =A0 , i dont see any answer at all to the what is the manual ad=ustment mean?

Nickn@all-cpas.com>, "Noam Chomsky ([REDACTED]
[REDACTED]
[REDACTED] Matthew Mazotas <[REDACTED]>
<mailto:[REDACTED]>
Cc: Isabel Scharmer <[REDACTED]>, Kathleen O'Malley <[REDACTED]>
<mailto:[REDACTED]>

Debor=h –

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As re=uested please find below the 2017 RMD information you requested re: Noam C=omsky. Please let us know if you require more information. Bes= regards and enjoy your 2 weeks out of the office.

Robert Katz, CFP® Wealth Strategies, Managing Director, Partner<=i>

Bainco International Investors

699 Boylston Street <<https://maps.google.com/?q=699+Boylston+Street&entry=gmail&source=g>> =E2 10th Floor •
Boston, MA 02116

[REDACTED] in • [REDACTED] Fax

[REDACTED]
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Last

Name

Acct #

Type

DOB

Age in 2017

IRS Factor (A)

A/C Value 12/31/2016

Manual Adjustment

2017 Minimum Distribution

2017 YTD Distribution

Amount remaining to distribute before 12/31/17

CA

Code

Chomsky

Noam Chomsky Inherited

A2A950422

IRA

12/07/28

89 5.9 \$ 393,651

\$ =A0 -

\$ 66,720.55

\$ 50,000

\$ 16,720.55

KH nc2ira

*Chomsky

Noam Chomsky

A2A950307

IRA

12/07/28

89=

12.0=	\$ 2,752,349
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\$ 150,000

\$ 241,862.41

\$ 390,000

\$ =A0 0

KH<=> ncira

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Seth Corkin, CFP®, ChFC®

Wealth Strategies Advisor

=/span>

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From: Mark O'Keefe

Sent: Thursday, June 08, 2017 3:26 PM

[REDACTED]

Subject: RE: June estimates

Hi Deborah –

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This request can be handled by our Wealth Strategies department. I've copied Robert Katz and his team on this response – they will be happy to handle (most likely tomorrow, since Robert is in NY today at a client meeting).

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Best regards,

Mark<=>

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From: Deborah Pechet Quinan [mailto:[REDACTED]]
Sent: 06/08/2017 9:00 AM
To: Mark O'Keefe <[REDACTED]>
Cc: Nickn@al-cpas.com <mailto:[REDACTED]>; Valeria Chomsky
<mailto:[REDACTED]>; Valeria Chomsky
([REDACTED]) <[REDACTED]>; Matthew
Mazotas <[REDACTED]>
Subject: June estimates

This message was sent securely using ZixCorp.

Hi Mark,<=u>

Nick Nichols needs to know what Noam's Minimum Required distribution is for 2017. A0 Can you please send the group on this email the Form 5498 securely, or the amount of the 2017 MRD? </=>

Many thanks,<=u>

Deborah</=>

Deborah Pechet Quinan, Esq. LL.M. A0
Shareholder
Chair, Trusts & Estates Group

255 State Street, 7th Floor

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=A0 please note

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