
From: Noam Chomsky [REDACTED]
Sent: Friday, October 20, 2017 2:28 AM
To: jeffrey E.; Valeria Chomsky
Subject: Re: trust

Good idea, and will talk it over with Valeria -- who's now so involved in all of the aspects of the Big Move -- today and the next few days -- that she can barely think about it. My immediate feeling, before consultation with her, is that we should delay this option until we see the outcome of the request for the distribution of the trust.
Noam

On Thu, Oct 19, 2017 at 11:46 AM, jeffrey E. <jeffvacation@mail.com <mailto:jeffvacation@gmail.com>> wrote:

it seems if both the trustees resign, you can appoint two people you trust.

On Wed, Oct 18, 2017 at 9:27 PM, Noam Chomsky [REDACTED] wrote:

Thanks for the information. Could you please let me know what steps I should take to regain control of the trust.

Thanks,

[REDACTED]
Date: Tue, Oct 17, 2017 at 7:21 PM
Subject: RE: trust
To: Noam Chomsky [REDACTED]
Cc: Gene Landy [REDACTED]
[REDACTED]

Hi Noam,

Max is asking because he has a duty to balance your interests, with the interests of the children who are the remainder beneficiaries. This is a matter of general fiduciary law governing trustees, absent a provision in the trust that specifically permits a trustee to disregard the interests of the remainder beneficiaries. Such a provision does not appear in Carol's trust. Please see page 2, paragraph 5.1 of the trust, attached. The trust is governed under Massachusetts law (see page 14 paragraph 13.6 of the trust) and it is possible that I may find case law to support the proposition that the interest of the beneficiary who is the surviving spouse takes precedence over the remainder beneficiaries of a marital trust; or a case that provides some guidance, such as to what extent the other financial circumstances of the surviving spouse must be taken into account when a trustee considers making a discretionary

principal distribution. Please let me know if you would like me to research these specific issues. This is generally the same issue we grappled with when you requested principal distributions for tax payments.

At this juncture I think it is a good idea to review the trustee appointment, removal, and resignation provisions of Carol's trust, and the history of the trusteeships. I summarize these provisions for you and Valerie below and I attach all of the referenced documentation.

Trustee Removal: You have the power under the trust instrument to remove Max provided that you are joined in the removal by a majority of your children, and provided that after the removal an independent trustee is serving. See the trustee removal provisions on page 5 at paragraph 8.2(a).

Trustee Resignations: Either or both of Max and Harry may resign as trustees voluntarily. See resignation provisions at page 5, paragraph 8.2(b).

Trustee Appointments: If one trustee resigns, the other appoints a successor. If both resign at the same time, they appoint their successors together. You must approve the appointments of the successor trustees. If there are no remaining or resigning trustees you make the appointment. A minimum of two trustees are required under the terms of the trust. See appointment provisions at page 5, paragraphs 8.1(b)-(d).

Trustee History of Carol's Trust: I have attached for your reference the following trust documents which document the trusteeship over the trust's term to date :

1. Carol's original trust dated 10/18/1989 in which you and she were co-trustees;
2. The First Amendment of Carol's trust dated 4/18/1991 by which she removed you as co-trustee and appointed Eric Menoyo as co-trustee to serve along with her. (Your acknowledgment of this removal is contained in this document);
3. The Second Amendment of Carol's trust dated 1/11/2007 by which she changed the provisions for the children after your death and also named you as a successor trustee to her upon her death or at any other time she ceased to serve as trustee, and she named Harry as a successor trustee to you in this document as well;
4. Your Declination to serve as successor trustee to Carol after her death, dated 1/22/2009;
5. Harry's Acceptance to serve as successor trustee to you after you declined to serve as trustee, dated 3/2/2009; and
6. Harry's Appointment of Max as successor trustee to Eric Menoyo after Eric Menoyo's death and your assent to that appointment, dated 5/20/2009.

I hope the above information is helpful. Please let me know if you would like me to do the research mentioned in the first paragraph of this note above, and if you would like to consider pursuing a change of trustees. I am happy to discuss all of this with you and Valeria to clarify any questions you may have. Please also let me know if you would like me to speak with Max tomorrow or if you would like me to postpone the call.

I look forward to hearing from you.

All my best,

Deborah

Deborah Pechet Quinan, Esq. LL.M.
Shareholder
Chair, Trusts & Estates Group
255 State Street, 7th Floor

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From: Noam Chomsky
Sent: Tuesday, October 17, 2017 4:37 PM
To: Deborah Pechet Quinan
Cc: Gene Landy; Valeria Chomsky
Subject: Re: trust



I don't see what there is to discuss with Max, and I don't understand his letter. It reads as if he is responsible for administering the trusts to ensure my financial future. This is the first time I have heard anything like this, and I do not know what the basis might be for such a conception.

I requested a distribution from the marital trust, my first such request, apart from a request for a withdrawal to cover taxes, which was not accepted without conditions that I found totally inappropriate.

I don't see what more is involved.=/p>

Noam

On Tue, Oct 17, 2017 at 3:33 PM, Deborah Pechet Quinan <[REDACTED]> wrote:

Dear Max,

I am available at 3:00 p.m. tomorrow afternoon, and would be happy to speak provided that Noam and Valeria give me permission to do so.

Best,

Deborah

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

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Direct: [REDACTED]

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&source=g> Cell: [REDACTED]
Assistant - Jayne Mahoney: [REDACTED]
Office: [REDACTED] <=pan style="font-size:11pt;font-family:Calibri,sans-
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family:Calibri,sans-serif;color:rgb(31,73=125)">
e-mail: dpq@riw.com <mailto:dpq@iw.com> www.rlw.com |

From: Max Kohlenberg [mailto:[REDACTED]]
Sent: Tuesday, October 17, 2017 3:24 PM
To: Deborah Pechet Quinan
Cc: Gene Landy
Subject: RE: trust

Would you have time for a call to discuss th=s tomorrow Deborah? In particular, I'd like to review with you how I might gather information about Noam's financial cir=umstances and needs, so that I can evaluate this request in light of my co=cerns that (a) the trusts remain available for his support over the balanc= of his lifetime, and (b) distributions from the trust are dedicated to his needs.

I am available tomorrow from 7am to 10am and=again from 2pm to 4pm.

Thanks,

Max

A. Max Kohlenberg
Howland Evangelista Kohlenberg Burnett, LLP<=span>
One Financial Plaza – Suite 1600
Providence, Rhode Island 02903=u>
Direct: [REDACTED]
Main: 4 [REDACTED]

Fax: [REDACTED]
[REDACTED]

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From: Deborah Pechet Quinan [REDACTED]
Sent: Tuesday, October 17, 2017 2:53 PM
To: Max Kohlenberg
Cc: Gene Landy
Subject: RE: trust

Hi Max,

Noam has not requested my input into this request.

Thanks,

Deborah

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

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e-mail: [REDACTED] www.riw.com |

From: Max Kohlenberg [REDACTED]
Sent: Monday, October 16, 2017 9:56 PM
To: Deborah Pechet Quinan
Subject: Fwd: trust

Deborah=-

I welco=e your thoughts on this.

Thanks,=/span>

Max

S=nt from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Max Kohlenberg [REDACTED]

Date: 10/16/17 9:55 PM (GMT-05:00)

To: Noam Chomsky [REDACTED]

Subject: Re: trust

Thanks for the quick reply Noam. I will get ba=k to you tomorrow.

Max

S=nt from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Noam Chomsky [REDACTED]

Date: 10/16/17 9:14 PM (GMT-05:00)

To: Max Kohlenberg [REDACTED]

Subject: Re: trust

I meant \$500,000.

Noam

On Mon, Oct 16, 2017 at 9:00 PM, Max Kohlenberg [REDACTED] wrote:

Forgive me for asking Noam, but did you mean \$500,00=, or \$50,000?

Thanks,

Max

S=nt from my Verizon, Samsung Galaxy smartphone

----- Original message -----

From: Noam Chomsky [REDACTED]

Date: 10/16/17 6:44 PM (GMT-05:00)

To: Max Kohlenberg [REDACTED]

Subject: trust

Dear Max,<=u>

=u>

I would like to ask =or a distribution from one of the marital trusts, for \$500,000, to deal wi=h current expenses of mine.

=u>

Thanks for your cons=deration

=u>

Noam

=u>

=u>

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=C2◆ please note

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