
From: Valeria Chomsky <[REDACTED]>
Sent: Wednesday, August 8, 2018 5:30 AM
To: jeffrey E.
Cc: Noam Chomsky
Subject: Fwd: FW: Accountings/reports

Should a letter like this be=written to Max?

Could you suggest what else should be included o= modified?

Fr=m the dates of these e-mails exchange (below), we can see that the waiting=time elapsed since one of my first request to receive the accountings/ rep=rts of the Trusts is unacceptable in a professional relationship.

Your law firm is not only=not corresponding to my expectations -- I expected all this information to=be available at your fingertips, but also I can see some intentional delay=that I would like an explanation about. On August 15, 2017, you wrot= to Deborah Quinan:

"I asked one of the ac=ountants in our office to review the annual reports (2009 – 2016) =or the Carol Chomsky GST Exempt and GST Non-Exempt Marital Trusts. A= I noted to you, the reports are from both Goulston & Storrs (as succe=sor trust company affiliate to Edwards Wildman Palmer and Locke Lord) and =ainco and the total runs between 2,500 and 3,000 pages. Based on this volume we are estimating that the cost of=a full-blown accounting would be around \$10,000 for each trust. Alte=natively, we could compile the data into summary report format (with the a=nnual reports attached as exhibits) for around \$5,500 per trust."

One year has passed how long more=should I wait to have access to information that I put you in charge and r=sponsible for them?

I would like to request an im=mediate explanation why my files, records and reports were not being kept i= order -- otherwise what else explanation for this endless and constant de=ay.

----- Forwarded message -----

From: Deborah Pechet Quinan</> <[REDACTED]>
Date: Sun, Aug 20, 2017 at 9:52 AM
Subject: F=: Accountings/reports
To: "Noam Chomsky" <[REDACTED]>
Cc: "Valeria Chomsky" <[REDACTED]>, Gene Landy <[REDACTED]>

Dear Noam,</=>

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Max is able to provide=two forms of accounts for the trusts. Please see our correspondence =elow.

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One is a summary repor=, which I what I generally provide to my clients where I am the trustee.=C2 This approach is far less costly to the trust, provides all of the f=ncial information for each year in categories and has the annual account statement with all of the transaction details a=tached. This will be the information you will need in order to determine if you have any additional questions, and can be accomplished more qui=kly. The cost to each trust for each year will be \$5,000 per account.

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The alternative approa=h is a much more detailed account which will double the cost to each trust=for each year, and take longer to deliver to you. The cost to each t=ust for each year will be \$10,000.

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The above costs are re=sonable in my estimation given the amount of time involved to prepare each=account. I recommend that Max prepares the summary report form of ac=ount for you.

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Please let me or Gene,=in my absence, know which form of account you would like Max to prepare an= we will let him know so that he can get started.

</=pan>

Best,

Deborah<=span>

Deborah Pechet Qui=an, Esq. LL.M. =A0

Shareholder

Chair, Trusts & E=tates Group

255 State Street, 7th Floor | Bost=n, MA 02109

Direct: [REDACTED] | Cell: [REDACTED] Assistant - Jayne Mahoney: [REDACTED]

Office: [REDACTED]

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<http://www.riw.com/attorney/deborah-pechet=quinan/>

<=u>

</=pan>

From: Max Kohl=nb erg [REDACTED]

Sent: Tuesday, August 15, 2017 8:27 AM

To: Deborah Pechet Quinan

Subject: RE: Accountings/reports

Yes indeed – the summary reports would show all of those elements.</=>

</=pan>

</=pan>

A. Max Kohlenberg</=>

Howland Evangelista Kohlenberg Burnett, LLP

One Financial Plaza #E2 Suite 1600

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From: Deborah Echet Quinan [REDACTED]
Sent: Tuesday, August 15, 2017 8:22 AM
To: Max Kohlenberg
Subject: RE: Accountings/reports

Max,

</=pan>

One follow-up question= Can you confirm that the annual summary accountings will each show =otals for each category of income, i.e.; total interest, total dividends, =tc. and each category of disbursement, i.e. total distributions to Noam, total investment management fees, total trust=e fees, etc.

</=pan>

Thanks,<=span>

Deborah<=span>

</=pan>

Deborah Pechet Qui=an, Esq. LL.M. =A0

Shareholder

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e-mail [REDACTED]=A0 | www.riw.com <http://ww=.riw.com/> | BIO

<http://www.riw.com/attorney/deborah-pechet=quinan/>

=u>

</=pan>

From: Max Kohl=nerg [REDACTED]

Sent: Tuesday, August 15, 2017 8:12 AM

To: Deborah Pechet Quinan

Cc: Verena Valle

Subject: RE: Accountings/reports

Thanks for the quick r=ply Deborah –

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Your understanding is =orrect – the trusts will bear the cost of the accountings/reports.=u>

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I will check the files=for the Memorial Drive records and send them along in the next day or two.=u>

</=pan>

Yours,<=pan>

</=pan>

Max

</=pan>

</=pan>

A. Max Kohlenberg</=>

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From: Deborah =echet Quinan [REDACTED]
Sent: Tuesday, August 15, 2017 8:10 AM
To: Max Kohlenberg
Subject: RE: Accountings/reports

Dear Max,

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Thanks very much. =A0 I will let you know. Please confirm my understanding that the tru=ts will bear this expense, not Noam personally.

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On another matter, cou=d you please check your files for a copy of the Memorial Drive lease, stoc= certificate, by-laws, and any other documents related to the Memorial Dri=e home? As you may recall it is a cooperative, not a condominium, and the corporate documents are not among =he materials you sent me. I do have the deed, title policy, promisso=y note, Notice of Lease and mortgage but I don't have any of the c=rporate documents.

</=pan>

Thanks,<=span>

Deborah<=span>

</=pan>

Deborah Pechet Qui=an, Esq. LL.M. =A0
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<http://www.riw.com/attorney/deborah-pechet=quinan/>
<=u>

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From: Max Kohl=nb erg [REDACTED]
Sent: Tuesday, August 15, 2017 7:53 AM
To: Deborah Pechet Quinan
Subject: Accountings/reports

Good morning Deborah –

I asked one of the accountants in our office to revi=w the annual reports (2009 – 2016) for the Carol Chomsky GST Exemp= and GST Non-Exempt Marital Trusts. As I noted to you, the reports a=ee from both Goulston & Storrs (as successor trust company affiliate to Edwards Wildman Palmer and Locke Lord) and Bainco and=the total runs between 2,500 and 3,000 pages. Based on this volume w= are estimating that the cost of a full-blown accounting would be around \$=0,000 for each trust. Alternatively, we could compile the data into summary report format (with the annual repo=ts attached as exhibits) for around \$5,500 per trust.

I will stand by to hear how Noam and Valeria would like us to proceed.

Thanks,

Max

A. Max Kohlenberg

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