
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 or modified?

From 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/ reports 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 wrote to Deborah Quinan:

"I asked one of the accountants in our office to review the annual reports (2009 – 2016) for the Carol Chomsky GST Exempt and GST Non-Exempt Marital Trusts. As I noted to you, the reports are from both Goulston & Storrs (as successor trust company affiliate to Edwards Wildman Palmer and Locke Lord) and Aincos 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. Alternatively, we could compile the data into summary report format (with the annual 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 responsible for them?

I would like to request an immediate explanation why my files, records and reports were not being kept in order -- otherwise what else explanation for this endless and constant delay.

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

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

[REDACTED], Gene Landy [REDACTED]
[REDACTED]

Dear Noam,</=>

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

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One is a summary report, 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 financial information for each year in categories and has the annual account statement with all of the transaction details attached. This will be the information you will need in order to determine if you have any additional questions, and can be accomplished more quickly. The cost to each trust for each year will be \$5,000 per account.

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The alternative approach 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 trust for each year will be \$10,000.

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The above costs are reasonable in my estimation given the amount of time involved to prepare each account. I recommend that Max prepares the summary report form of account 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 and we will let him know so that he can get started.

</=pan>

Best,

Deborah<=span>

Deborah Pechet Quinan, Esq. LL.M. A0

Shareholder

Chair, Trusts & Estates Group

255 State Street, 7th Floor | Boston, MA 02109

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

Office: [REDACTED]

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

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

<=u>

</=pan>

From: Max Kohlberg [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.</=>

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</=pan>

A. Max Kohlenberg</=>

Howland Evangelista Kohlberg Burnett, LLP

One Financial Plaza =E2 Suite 1600

Providence, Rhode Island 02903

Direct: [REDACTED]

Main: [REDACTED]

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

Max,

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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.

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Thanks,<=span>

Deborah<=span>

</=pan>

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

Shareholder

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

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

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

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From: Max Kohl=nberg [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

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</=pan>

A. Max Kohlenberg</=>

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From: Deborah =echet Quinan



Sent: Tuesday, August 15, 2017 8:10 AM

To: Max Kohlenberg

Subject: RE: Accountings/reports

Dear Max,

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

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

</=pan>

Thanks,

Deborah

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Deborah Pechet Quinan, Esq. LL.M. I
Shareholder

Chair, Trusts & Estates Group

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

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

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From: Max Kohlberg [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 review the annual reports (2009 – 2016) for the Carol Chomsky GST Exempt and GST Non-Exempt Marital Trusts. As I noted to you, the reports are 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 we 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 reports 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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