

**From:** jeffrey E. <jeevacation@gmail.com>  
**Sent:** Thursday, December 21, 2017 6:02 PM  
**To:** Valeria Chomsky  
**Subject:** Re: Summary of call with Max re financial information needed

give him the assurance

On Thu, Dec 21, 2017 at 12:59 PM, Valeria C=omick

How do you think we should answer?

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

F=om: Deborah Pechet Quinan <dq@riw.com <mailto:dq@riw.com> ><=span>

Date: Thu, Dec 21, 2017 at 12:52 PM

Subject: Summary of call with Max re financial information needed

To: "Mass Channel."

Dear Noam and Valeria,

As you know I spoke with Max on Monday afternoon regarding his requirements for financial information from you in order to make the additional principal distributions from the marital trust that we requested. He has reduced the scope of the financial information request he sent previously, to something that is more reasonable. As a result, he would like to see the following:

=>1. =C2    A current balance sheet (assets and liabilities)

**<=>2. =C2** A listing of gifts made (I believe gifts made in 2016 =nd 2017 will suffice.)

a. =A0 I am not aware of any gifts in addition to the Assignm=nt to Valeria of the copyright to Who Rules the World; please let me know =f any additional gifts.

b. =A0 Transfers of funds to Valeria that are used for the payment of ongoing household expenses are not gifts.

<=>3. =C2 The extent to which your expenses exceed your income; =nd

<=>4. =C2 The extent to which you will be needing periodic distributions from the trust.

Max indicated that he is not interested in the details of your expenses. He is looking for big picture information.

I believe we are at the point in this negotiation with Max where we have reduced his information request to a more reasonable scope. I would like your permission to represent to him that he will be provided with the above. He is balking at making the Massachusetts estimate until he receives this assurance. My and Max's brief email correspondence of yesterday evening regarding the Massachusetts estimate (and confirmation that the federal payment has been sent) will follow this email. If you need time to consider this, please ensure that you make the estimated tax payment by 12/31 directly to the Mass D.O.R. from other funds, with the voucher that Matthew Mazotas sent yesterday via email and please let me know to keep me updated.

I also discussed with Max the status of the list he is preparing for a successor independent trustee. His belief is that a corporate trustee may not be willing to serve given the asset size of the trusts. As a result he is considering lawyers who serve as trustee. He is not knowledgeable regarding the current balance of your IRAs and this may influence him to include certain corporate trustees on the list he is preparing for Harry. May I disclose this information to him?

I look forward to hearing from you.

Best,

Deborah

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Deborah Pechet Quiñan, Esq. LL.M. =A0  
Shareholder

Chair, Trusts & Estates Group

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=A0 please note

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