
From: Valeria Chomsky <[REDACTED]
Sent: Thursday, December 21, 2017 6:55 PM
To: jeffrey E.
Subject: Fwd: Summary of call with Max re financial information needed

Jeffrey,

Noam needs your reassurance ab=ut this he wrote you. Could you please write him?

=div dir="ltr">
Valeria

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

From: Noam Chomsky <[REDACTED]>

Subject: Fwd: Summary of call with M=x re financial information needed

To: "jeffrey E." <jeevacation@gmail.com>, Valeria C=omsky <[REDACTED]>

<[REDACTED]>

Max seems to be trying to m=ke this as difficult and unpleasant as possible. Do you think we sho=ld provide this information?

If so, I=would be inclined to answer the question about expenses and income by spel=ing out how they were taking money from the IRA for distribution to family=and taxes/management fees for the whole estate, exhausting it.

<=r>

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

From: Deborah Pechet Quinan <[REDACTED]>

Date: Thu, Dec 21, 2017 at 10:52 AM

Subject: Summary of c=ll with Max re financial information needed

To: "Noam Chomsky" <[REDACTED]>

"Valeria Chomsky" <[REDACTED]>

Cc: "Richard Kahn" <[REDACTED]>

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:=/u>

1. =C2 A current balance sheet (assets and liabilities)
2. =C2 A listing of gifts made (I believe gifts made in 2016 and 2017 will suffice.)
 - a. =A0 I am not aware of any gifts in addition to the Assignment to Valeria of the copyright to Who Rules the World; please let me know of 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; and
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

Deborah Pechet Qui-an, Esq. LL.M. =A0
Shareholder
Chair, Trusts & Estates Group
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