
From: Valeria Chomsky <[REDACTED]>
Sent: Wednesday, December 20, 2017 5:08 PM
To: jeffrey E.
Subject: Fwd:

This is the new lawyer, we were considering to hire to represent us, because she practices in both States MA and AZ. It seems to be one of Max's friends.

What now?

Valeria

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

From: [REDACTED]
Date: Wed, Dec 20, 2017 at 8:58 AM
Subject: RE:
To: [REDACTED]
Cc: [REDACTED]

Dear Noam and Valeria,

I had a call from Attorney Max Kohlenberg, unsolicited. He was calling to determine whether I might be able to serve as trustee of a marital trust and he began to describe the situation. I stopped him as I thought he was describing your situation. He is now aware that we plan to meet in January, but nothing else. He seemed glad that you were thinking of having local representation.

Shall we set a date to meet? Best, Shari

Shari Levitan | Holland & Knight
Private Wealth Services | Chair – New England Holland & Knight LLP
10 Saint James Avenue, 11th Floor | Boston, MA 02116 Phone [REDACTED] | Fax [REDACTED]
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From: Levitan, Shari A (BOS - X71405)
Sent: Tuesday, November 28, 2017 4:22 PM
To: [REDACTED]

Cc: 'Savage, Stephen M.' [REDACTED]; Bennett, Denise M (BOS - X75810)

Subject:

Dear Noam and Valeria,

It was a pleasure to speak with you briefly yesterday from the Phoenix airport on my way back to Boston. As we discussed, you plan to send me copies of the estate planning documents you have, any emails, and make email introductions to various individuals you'd like me to contact for additional information. My assistant, Denise Bennett, will prepare an engagement letter for estate planning, and we will look for a date in mid to late January for me to visit with you in Tucson. Best regards, Shari

Shari Levitan | Holland & Knight
Private Wealth Services | Chair – New England Holland & Knight LLP
10 Saint James Avenue, 11th Floor | Boston, MA 02116 Phone [REDACTED] | Fax [REDACTED]
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