
From: jeffrey E. <jeevacation@gmail.com>
Sent: Monday, August 7, 2017 8:03 PM
To: Valeria Chomsky
Subject: Re: today - from our estate lawyer

dumb this is all old news. the question is why did noam not receive all the income from the trust and the trust instrument requires. .

On Mon, Aug 7, 2017 at 3:55 PM, Valeria Chomsky <[REDACTED]>
> wrote:

"Dear Noam,

=/p>

I will take care of requesting the accounts from Max, and notifying Bainco on your behalf that your personal assets should be segregated from the trust's assets in their reporting, and no longer mailed to Max. This would include statements for your IRAs as Bainco as well as your revocable trust. Their reporting is unclear and at first glance it appears that the Cambridge home is owned by your revocable trust, but as I indicated in my email to you of last Wednesday, below, I believe that you personally own your Cambridge home and that it is not in your trust. However I need to confirm this analysis when you provide me with the documentation that I have requested in the past, to ensure that the home passes to Valeria at your death.


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A detailed summary of the facts as per my review of the file appears below, along with the document request and follow-up item requests in bold. I attach the records that I have reviewed. I am sending this via securemail due to the sensitive nature of some of the attachments. Please let me know if you have any trouble accessing the documents.

1. =A0 The cost of the Cambridge home was \$1.2M. Please see P&S and Title Insurance Policy attached.

2. The home is actually a Cooperative so you purchased a Leasehold Interest in Unit 404 and the store room number 4-404, of which Longview Corporation is the Lessor.

a. Please see Notice of Lease attached obtained from the Registry of Deeds.

b. =C2

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4. =A0 You borrowed \$516,000 for this purchase from the Carol S. Chomsky Exempt Marital Trust. There is no mortgage/security interest on record to secure this borrowing. Please see Promissory Note attached.

5. =A0 Please let me know if you plan to put the Cambridge home on the market and if so when; and if you plan to purchase a residence in Tucson. The state of your domicile, which is determined for estate tax purposes on a subjective basis, is central to your estate planning. I need to advise you as to this matter but I do not have sufficient information on your plans at this point. Please let me know when we can schedule a call to discuss this. =C2

On a side note, my accounting department let me know recently that you have several invoices outstanding, dating back to May. I am sure these have slipped through the cracks due to your busy travel schedule! My firm would appreciate receiving payment. Please let me know if you would like me to send copies of these invoices.

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