
From: Valeria Chomsky <[REDACTED]>
Sent: Monday, August 7, 2017 8:11 PM
To: jeffrey E.
Subject: Fwd: today - from our estate lawyer

Exactly. We don't get answers for our real quest=ons.

Valeria =A0

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

From: jeffrey E. <jeevacation@gmail.com><=r>Date: Mon, Aug 7, 2017 at 4:02 PM
Subject: Re: today - from our estate lawyer
To: Valeria Chomsky <[REDACTED]> <mailto:[REDACTED]>

dumb =A0 this is all old news. the question is why did noam no= receive all the income from the trust and the trust instrument requires.=C2 .

=div class="h5">

On Mon, Aug 7, 2017 at 3:5= PM, Valeria Chomsky <[REDACTED]> <mailto:[REDACTED]>
> wr=te:

"Dear Noam,

=/p>

I will take care of requesting the accounts =rom Max, and notifying Bainco on your behalf that your personal assets sho=ld be segregated from the trust's assets in their reporting, and n= longer mailed to Max. This would include statements for your IRAs a= Bainco as well as your revocable trust. Their reporting is unclear =nd at first glance it appears that the Cambridge home is owned by your rev=cable trust, but as I indicated in my email to you of last Wednesday, belo=, I believe that you personally own your Cambridge home and that it =s not in your trust. However I need to confirm this analysis when yo= provide me with the documentation that I have requested in the past, to e=sure that the home passes to Valeria at your death.

=p class="MsoNormal" style="padding:0px; border:0px; font-size:15.9722213=4511719px; font-family:Arial,Helvetica,sans-serif; vertical-align:baseline; color:rgb(0,0,0)">

A de=ailed summary of the facts as per my review of the file appears below, alo=g with the document request and follow-up item requests in bold. I attach =he records that I have reviewed. I am sending this via securemail du= to the sensitive nature of some of the attachments. Please let me k=ow if you have any trouble accessing the documents.

1. <=pan style="margin:0px;padding:0px;border:0px;font-style:inherit;font-size:11pt;font-family:Calibri,sans-serif;vertical-align:baseline;color:rgb(31,3,125)"> The cost of the Cambridge home was \$1.2M. Please see P=amp;S and Title Insurance Policy attached.

=C2

2= =A0 The h=me 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 =essor.

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

b. Please provide me with a copy of all Longvie= Corporation documentation, which should include the lease, corporate by-l=ws, any Assignments of Lease, and any other documentation relating t= your leasehold interest and relating to Longview Corporation. You m=y have a single binder from Longview with all of the pertinent documents.<=span>

3. =A0 You borrowed \$539,000 for this purc=ase from Boston Private; there is a mortgage on record and as such the ban= has a security interest in the home. Please see Mortgage with Lease=old Rider and Cooperative Rider attached obtained from the Registry of Dees=.

4. 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 N=te attached.

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

On a side note, my accounting department let me know recently that =ou have several invoices outstanding, dating back to May. I am sure =hese have slipped through the cracks due to your busy travel schedule! =A0 My firm would appreciate receiving payment. Please let me=know if you would like me to send copies of these invoices.

=p class="MsoNormal" style="padding:0px; border:0px; font-size:15.9722213=4511719px; font-family:Arial,Helvetica,sans-serif; vertical-align:baseline; color:rgb(0,0,0)">

I lo=k forward to hearing from you soon, and to receiving the Coop documentatio=."

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please note

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