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

=C2

2= A0 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 =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 Dee=s.

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;c=lor:rgb(0,0,0)">

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

--

please note

The information contained in this communication is confidential, may be attorney-client privileged, may constitute inside information, and is intended only for the use of the addressee. It is the property of JEE. Unauthorized use, disclosure or copying of this communication or any part thereof is strictly prohibited and may be unlawful. If you have received this communication in error, please notify us immediately by return e-mail or by e-mail to jeevacation@gmail.com , and destroy this communication and all copies thereof, including all attachments. copyright - all rights reserved