
From: jeffrey E. <jeevacation@gmail.com>
Sent: Monday, August 7, 2017 8:18 PM
To: Valeria Chomsky
Subject: Re: today - from our estate lawyer

ask him to give you the ACCOUNT NUMBER of the trusts=C2 i dont see it on the statements =t shows millions of dollars in value .

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

"De=r Noam,

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

A detailed summary o= the facts as per my review of the file appears below, along with the docu=ent 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 sensiti=e nature of some of the attachments. Please let me know if you have =ny trouble accessing the documents.

=C2

1. =C2 The cost of the Camb=idge home was \$1.2M. Please see P&S and Title Insurance Policy a=tached.

2. =C2 The home=is actually a Cooperative so you purchased a Leasehold Interest in Unit 40= and the store room number 4-404, of which Longview Corporation is the Les=or.

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

b. =C2 Please prov=de me with a copy of all Longview Corporation documentation, which should =nclude the lease, corporate by-laws, any Assignments of Lease, and a=y other documentation relating to your leasehold interest and relating to =ongview Corporation. You may have a single binder from Longview with=all of the pertinent documents.

<= class="m_-4025314213875861364gmail-MsoListParagraph" style="margin:0p=;padding:0px;border:0px;font-size:15.972221374511719px;font-family:Arial,H=lvatica,sans-serif;vertical-align:baseline;color:rgb(0,0,0)"><=pan style="margin:0px;padding:0px; border:0px;font-style:inherit;font-fam=ly:inherit;vertical-align:baseline">3. =A0You borrowed \$539,000 for this purchase f=om Boston Private; there is a mortgage on record and as such the bank has = security interest in the home. Please see Mortgage with Leasehold R=der and Cooperative Rider attached obtained from the Registry of Deeds.

4. =C2 You borrowed \$516,00= for this purchase from the Carol S. Chomsky Exempt Marital Trust. T=ere is no mortgage/security interest on record to secure this borrowing.=C2 Please see Promissory Note attached.

5. =A0 Please let me know if you plan to p=t the Cambridge home on the market and if so when; and if you plan to purc=ase a residence in Tucson. The state of your domicile, which is dete=mined for estate tax purposes on a subjective basis, is central to your es=ate planning. I need to advise you as to this matter but I do not ha=e sufficient information on your plans at this point. Please=let me know when we can schedule a call to discuss this. </=pan>

On a side note, my accou=ting department let me know recently that you have several invoices outsta=ding, dating back to May. I am sure these have slipped through the c=acks due to your busy travel schedule! My firm would appreciate rece=ving payment. Please let me know if you would like me to sen= copies of these invoices.

=/span>

I look forward to hearing from you so=n, and to receiving the Coop documentation."

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=A0 please note

The information contained i= this communication is confidential, may be attorney-client privileged,=may constitute inside information, and is intended only for the use =f the addressee. It is the property of JEE Unauthorized use, disclos=re or copying of this communication or any part thereof is strictly pro=hibited and may be unlawful. If you have received this communication =n error, please notify us immediately by return e-mail or by e-mail to =a href="mailto:jeevacation@gmail.com" target="_blank">jeevacation@gmai=.com, and destroy this communication and all copies thereof, inc=uding all attachments. copyright -all rights reserved

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