



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

6/24/2010	2:06 PM	Rich Richers returned my call. He said that Nelva Brunsting asked him to get an atty to write an opinion ltr. He would rather that we have that first and then have a teleconf call w/ him after that, if necessary. I told him that I didn't think CLF knew that Nelva asked that. If CLF still wants a teleconf call, I will call Rich to sched this. Otherwise, we will just wait for the opinion ltr. EM CLF, skp	Summer Peoples
6/24/2010	12:30 PM	I called Nelva Brunsting to tell her that CLF wants a brief teleconf call w/ Rich Richers and her. She said that she can accommodate the sched next wk whenever it's sched. I called Rich to sched appt. He wasn't avail so I had to LVM. I'm waiting for his return call and then will call Nelva to tell her when conf call is. skp	Summer Peoples
6/14/2010	5:12 PM	Returned Nelva Brunsting's call. Resch QBD signing to tmrw @ 11:30am. EM CLF, skp	Summer Peoples
6/14/2010	11:31 AM	Ms. Brunsting called and said she saw CLF last Tuesday 6/8th and thinks she is suppose to come in to sign some papers. Please let her know if this is true and call to schedule. Pls call 713-464-4391EM to CLF c: SKP	Merlin Case
6/11/2010	4:00 PM	CLF made changes to the QBD drafted after AEV adn SSV reviewed them. CLF	Candace Freed
6/10/2010	5:26 PM	Doug Williams of Edward Jones called for SSV re: Q - Left message, CLF returned the call and stated that DT is mandatory income (includes interest and Dividends) and principal for hems at trustee discretion. CLF	Candace Freed
6/8/2010	4:53 PM	Mailed BNY Mellon forms & new W-9. CLF made copy for file. skp	Summer Peoples
6/8/2010	4:43 PM	Visited with Nelva today. She has an appt with her oncologist on thursday and she did indicate that she was not a candidate for chemo in that her lungs were not strong enough. Not sure what course of treatment she will have and they will go over that on Thurs. She said that she was concerned about Candy, her daughter in CA. Candy was adopted by them as a child. She went off to college in CA and met a young man and married him. They both dropped out of college and she has been their ever since. The man has now run out on her adn she has problems making ends meet. She would like to make an early distribution to Candy in the amount. CLF advised that	Candace Freed
6/3/2010	5:25 PM	I called Nelva Brunsting to sched 5/3(f). Set for 6.8.10. EM CLF, skp	Summer Peoples
6/1/2010	9:04 AM	Havign SKP mail the agreement to Ms. Brunsting. She will need to sign and return to us. CKF.	Candace Freed
6/1/2010	8:30 AM	Rec'd atty fee agmt. fm Jeremy Saint on behalf of Larry Storm. Put on CLF's chair for rev/w. EM CLF, skp	Summer Peoples
5/27/2010	4:01 PM	Doug Williams of Edward Jones called for SSV (LVM @ 8:52am) re DT acct instr. Re dividends & interest that are to be deposited to ST: 1) Is she unable to take principal? 2) is she required to take dividends & int? 3) Is it dividends & interest only? Pls call. 713-464-6071. EM SSV & CLF. skp	Summer Peoples
5/27/2010	9:09 AM	Nelva Brunsting called to give us permission to speak with her Broker, Doug Williams (who called earlier and left a voice message with his number), regarding her Trust.EM to CLF/cc:SKP	Merlin Case
5/25/2010	12:11 PM	Rich Richers called for CLF (LVM @ 11:08am) to say that fm all that he has found and discussed w/ other Iowa attys, per the Iowa Code there is no discernable problem w/ a testamentary tr that was revocable and became irrevocable owning farmland in Iowa. Ch 9-H.1 of Corp Farming Law of Iowa, Subsection 22 specifies that a Tr can own property. If CLF needs to talk w/ Rich about this more, pls call. 712-722-3375. EM CLF, skp	Summer Peoples
5/20/2010	10:46 AM	CLF emailed Mr. Storm the information needed for a opinion letter engmt that he is to send. CLF	Candace Freed
5/19/2010	5:11 PM	Going to Oncologist. Theyfound a spot on her liver. She said she would be out of pocket but that she agreed to having an opinion letter done by the atty and to send her whatever she needed to sign. CLF	Candace Freed
5/19/2010	2:10 PM	CLF called Larry Storm at (712)277.4561 to see what he would charge to provide an opinion letter as to whether our bypass trust will qualify as an exception to 9H.1.	Candace Freed



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- 5/17/2010 11:02 AM CLF spoke to Steve Mollen at the AG office Farm Division. He said that the law is pretty broad and covers a lot but there are more exceptions to the law . Best to get an opinion from a lawyer there in IOWA to ensure that we meet the requirements.He did state that the SiouX county is the farthest point in the state and is rural and the largest town in Sioux Center. CLF Candace Freed
- 5/17/2010 11:02 AM Brunsting. Darlene called from the Brokerage Firm and asked some Q's about the set up of th DT. CLF answered her and reminded her that ST was the beneficiary of all the income and Div's - she said she would see if that would be able to be set up. Edwards Jones. CLF Candace Freed
- 5/14/2010 12:04 PM CLF called the IOWA State Atty generals Office and left a message for the Farm Attorney Steve Moliem. Need aid in cropland and Irrev trust laws. CLF Candace Freed
- 5/11/2010 5:20 PM Rec'd greencard for CMRRR pkgs mailed to MetLife & Chevron. skp Summer Peoples
- 5/4/2010 2:20 PM Mailed fndg ltr & encl to MetLife & Chevron Corp via CMRRR. skp Summer Peoples
- 5/4/2010 1:56 PM I noticed that the Chevron Corp fndg pkg to be mailed to BNY Mellon Services was altered (DT EIN was crossed out and Nelva Brunsting's SSN was written in). CLF said she didn't do that. I called Nelva and she said that she only signed the papers and didn't change anything. The girl at the bank that stamped her medallion guarantee must have done that. I told Nelva that I will change the EIN back by crossing through the handwritten SSN and writing in the DT EIN again. I told her that the papers may get bounced back to us for her to sign them again. We will see what Mellon does. I have made copies for our file. skp Summer Peoples
- 4/28/2010 3:23 PM Rich Richers called for CLF (LVM @ 10:48am). He has spoken w/ several attys in Iowa. They have ckd the Iowa Code. They believe that a Testamentary Tr is allowed to hold farmland property in Iowa. Test Tr incl Revocable Tr that was not revoked prior to death and became Irrev Tr after death. That is the interpretation of every atty he has spoke to. It's in the same code section that CLF is citing re definition of Test Tr (Iowa Code Ch 9 H.1). Pls call if there's questions. 712-722-3375. EM CLF. skp Summer Peoples
- 4/23/2010 1:18 PM Met with Ms. Brunsting today. She said she is havign some health issues and needed help with the funding. She is to medallion Guarantee the two letters (Chevron Irrevocabel stock Powernad one other) to deliver the share certificates as well as the death certs and we will take care fo sendign them out for her. CL F advised her we will bill for services. CL F Candace Freed
- 4/21/2010 11:01 AM Called Rich (the CPA in IOWA) and he said he talked with a couple of trust dept people as well as an atty there and they did not see the IRR trust owning such property to be a problem. He said he would look into it. CLF read the previous attroeny opinion form 1996 and gave him teh code sections - He said he woudl do a little research to check it out. CLF Candace Freed
- 4/21/2010 10:53 AM Nelva called again and spoke with Connie - CLF took the call. She is having a difficult time and was having CLF go over each packet prepared for her re: the funding. She seemed a little out of sorts and said she wished she had not even done all this. I told her that I would help her and that while we prepare the funding documents, we have the clients handle it to keep their costs down. CLF told her we would be able to help her but that we charge for those services. She said she needed help. I told her to get the medallion guarantees from teh bank and come in on Friday and we would take care of it. CLF Candace Freed
- 4/20/2010 2:33 PM Called Rich R. the CPA in Iowa. Had to leave a mesage. CLF had sent an email to an Atty in IOWA on Wealthcounsel and never received a response. CLF Candace Freed
- 4/20/2010 11:41 AM Nelva Brunsting called and wants to set up a mtg. to go over her to do l1st. She does not understand some of the items. Pls. call 713-464-4391EM to CLF cc: SKP Merln Case
- 4/1/2010 3:42 PM CLF discussed brunsting with SSV. there is not trust protector is this trust although Ms. B can have some flexiability with the way the kids get the trust assets and then add QBD with PATS. CLF Candace Freed



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3/26/2010	11:34 AM	CLF reviewed the deed and found the following issues:US deeds advised that an revocable trust is the only trust that can own agricultural cropland. CLF noticed this and that the deed said it was a undivided 1/2 interest which is not correct. CLF to review with SSV to determine what is to be done. CLF	Candace Freed
3/25/2010	2:20 PM	CLF reviewed the Trust and the issues with CHIP and we came to conclusion that the Trustee has sole and absolute discretion with regard to distributions. CLF advised her that she should check to see who the bene of the policy is (Owner is the Trust of which	Candace Freed
3/24/2010	1:54 PM	CLF called Ms. Brunsting and advised her that Anita was calling. CLF told her that it was best for Candace not to take a distribution from teh ILIT and that she would rather Nelva loan her the money rather than to do so from the ILIT. CLF	Candace Freed
3/16/2010	4:50 PM	Rec'd US Deeds Iowa Deed for Nelva Brunsting to sign. Also rec'd bill fm US Deeds for cost of Deed prep and filing. skp	Summer Peoples
3/15/2010	3:24 PM	LVM for Anita Brunsting to tell her that CLF deferred this question to AEV and that he will advise her of response. EM CLF & cc AEV & SSV. skp	Summer Peoples
3/12/2010	10:00 AM	Anita Brunsting called regarding parents Trust: (Nelva) 361-550-7132. There is a Life Insurance Policy in the LT (in fact, that is the only thing in the Trust) that the kids have to sign a waiver each year, waiving their right to any funds. Her sister wants to take her share. Is this possible?Pls. call to discuss.EM to CLF cc: TS	Merlin Case
3/4/2010	4:35 PM	Rec'd greencard fm CMRRR of fndg bk mailed to CPA. skp	Summer Peoples
3/4/2010	9:06 AM	Holly fm US Deeds EM me needing more info prior to prepping DT Deed. Replied to her EM and attached copy of death cert. skp	Summer Peoples
3/4/2010	8:00 AM	MCC said that Nelva Brunsting did come by the office on 3.1.10 to pick up her fndg bk. Now I only need to complete the US Deeds for Iowa property. Once that has been signed, pd for, and recorded, then this file will be completed. skp	Summer Peoples
2/25/2010	8:59 AM	Nelva Brunsting said she would be by the office today or tomorrow to pick up her copy of the fndg bk. skp	Summer Peoples
2/25/2010	8:28 AM	File pd in full. CMRRR fndg bk to CPA. Called client to pick up her copy. May close file in 2 wks, by 3.15.10. Merely holding file on site for any questions CPA has. skpMailed to:MR. RICHARD K. RIKKERS, CPA KROESE & KROESE, CP 540 NORTH MAIN AVENUESIOUX CENTER, IOWA 51250	Summer Peoples
2/24/2010	1:12 PM	Cif spoke to Rich Richers. CLF got his email address explained abt the IRS letter and he said he would handle it. Told him to expect a CMRRR from us as well with the Funding Books. CLF	Candace Freed
2/24/2010	12:04 PM	CLF had 5/3 with Ms. Brunsting. She took her p ackets with her. The only ones that may be an issue is aid with the Broker at Edward Jones to allocate stocks and the Credit Union Acct that has titling in the name of Elmer. Ms. B brought a copy fo the Insurance policy that was Travelers and John deere. It actually paid out but through metlife (she did not know that it had moved over there). It was 3735.00 and some \$13.51 in interset. Discussed options lsnce the IT was the beenficiary. She said she would rather over allocate to the ST than redo the DT allocations again. Made changes to teh AE and had her sign off. Made change the funding allocation porposal (tab 4) and replaced it. Showed LT as beneficiary but allocated 100% to her ST. CLF to call teh CPA in Iowa and email in PDF the IRS letter that she received. Also advised her that I would send the funding book to him direct.CLF called CPA and obtained the following address. Also left a message for the CPA to call and give email address. LVM. Address:Krouse & Krouse540 North Main Avenue Sioux Center Iowa 51.250	Candace Freed
2/24/2010	10:02 AM	CLF reviewed the Fundign Package and made chagnes to the fundign documents. CLF	Candace Freed
2/10/2010	12:30 PM	EM order form to US Deeds for Quit Claim Deed to be prepped for Iowa property to trans it fm FLT to DT. skp	Summer Peoples
2/10/2010	10:02 AM	I called Nelva Brunsting to obtain her medical agents' info for me to draft docs. skp	Summer Peoples



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1/25/2010	12:15 PM	Rich Richers returned CLF's return call (LVM @ 10:21am) because they need to issue 1099 for rent pd to Tr (?). He needs to take care of this this wk and wants to clarify some things. Pls call. 712-722-3375. EM CLF. skp	Summer Peoples
1/25/2010	11:54 AM	CLF returned the call to Rich Richers.712-722-3375. -Ms. B has farmland that is leased out and she rec'd a check from made out teo the FLT. He is the Family CPA and handles all of the work for them. I explained we have not funded yet but that when we do, if I am remembering correctly, the land was Elmers and therefore would likely be allocated to his Dt but that all income is required to be pushed out to her thus I told her it was ok for now to use her social for the FLT till we split. CLF advised him that he would be getting a funding bk on completion.	Candace Freed
1/21/2010	5:23 PM	Rich Richers (last name?) called for CLF (LVM @ 2:09pm) because he is working w/ Nelva Brunsting and has 1099s to issue to LT. 1041 to be prepared this yr. He needs to confirm what needs to be done. He needs LT tax ID#. Pls call. 712-722-3375. EM CLF. skp	Summer Peoples
1/20/2010	12:36 PM	CLF talked with Ms. B and she needed to know what the tax ID for the family trust was. I told her for now its her social. She is coming in for 5/2 on Jan 27 at 10:00 am. for PM2. Sending her the AE but we need confirmation on the MetLife Amount and the 3735.00 policy of insurance and if it was in effect. CLF was advised by Ms. B that the MetLife policy proceeds that paid out by check went to Ed Jones. CLF had final review of AE today 1/20/2010, CLF	Candace Freed
1/20/2010	11:46 AM	NELVA BRUNSTING CALLED FOR CLF SHE WANTS TO MAKE AN APPT TO SEE HER.EM to CLF/cc:TS	Merlin Case
1/19/2010	5:19 PM	Nelva Brunsting called for CLF (LVM @ 3:00pm). Pls call her. She needs to talk w/ CLF for a little bit. EM CLF. skp	Summer Peoples
11/10/2009	5:08 PM	Nelva Brunsting dropped off add'l asset info. Put in LLM's inbox. EM LLM. skp	Summer Peoples
10/15/2009	4:49 PM	Returned Mrs. B phone call from ysterday and apologized for it. She just wanted to verify the policy # we were questioning of being valid. She said she thought this would be the last of what she needed to do and will be checking on that. llm	Leticia Meador
10/14/2009	4:37 PM	Nelva Brunsting called (LVM @ 11:21am) to reconfirm the # of Met Policy that might still be in effect. Pls call. EM LLM. sk	Summer Peoples
9/24/2009	3:51 PM	CLF called Nelva - Asked her if the ILIT was funded and she was continued to make the Gifts to the trust. She said yes, it owns a 2nd to die policy and Greg and AL set it up. I told her to contct her CPA when its tax time and make sure that they are filing a form 709 each year to preserve the GST. She beleives that teh Value of the policy was 250,000.00 2nd to die. CLF	Candace Freed
9/24/2009	3:45 PM	Clf rev'd the AE. Need a couple of payout of LifeInsurance payments info from Ms. B as she sends. The AE will need to be updated with those amounts, sign block added and sent to MS. B for the note to set 5/2. CLF	Candace Freed
9/24/2009	9:29 AM	CLF called Ms. B to discuss the asset lists and the information that Tisha has requested from her. -Not sure that the Ohio	Candace Freed



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9/23/2009	10:10 AM	Recd TC from Mrs. B. She said she had the deposit slips on the life Ins payouts. She still has not recd the Chevron. She said one payout went to I think she said Ed Jones for bonds. She again asked about coins and the watch that she doesn't understand why we need that. They are more a sentimental thing and not worth much. That CLF did not have that on her to do list. She thought that everything she brought in the other day would suffice, it was all the things on the list. She said she is tired of dealing with other people. That first she meets w/CLF and then SK and now me. She doesn't think that anyone knows what they are doing and we need to get that straight. I asked her who was dealing w/and she said SK. I told her that we are CLFs asst. That's what we do, we assist CLF. That I do one thing & SK does another. She would like for me to ask CLF @ the coins/watch and get back to her to have CLF call her. I told her I would do that and she just hung up. She was not a friendly sounding person. I thought it would be easiest having her give us copies of the payouts or ltr since the intake form showed there were @ 5 policies. After entering the info we have, there are 9 policies! I guess I have to req Form 712s in order to get the payout amount? And what about the coins & watch??? EM CLFcc SK. llm	Leticia Meador
9/22/2009	5:03 PM	TC to Mrs. B. to see if she has recd the ins payouts. She said she thought she had given us everything on the "to do" list. The ins payouts was not on it. She sounded a bit confused and said she will have one of her kids help her. The coins and the watch are not worth much she said. I also asked about the Transport Holding stock and she said she had not heard of it. Will check w/CLF to see if I need to keep this info or remove. EM CLF. llm	Leticia Meador
9/17/2009	4:39 PM	Nelva Brunsting dropped off asset info for CLF's attn. Put in LLM's inbox. EM CLF & LLM. sk	Summer Peoples
9/16/2009	8:36 AM	CLF returned her call. She has her To Do list ready and she will drop things off tomorrow. I asked her to give us at least a week to process it and and we'll let her know if there is any additional info needed. CLF	Candace Freed
9/15/2009	5:14 PM	Nelva Brunsting called for CLF (LVM @ 10:26am) because she thinks she has all that she needs to change LT to ST. Pls call. EM LLM & cc CLF. sk	Summer Peoples
9/1/2009	3:34 PM	Ms. Brunsting called and wanted to know what the tax ID # was of the Trust. I spoke with Summer and told her to use her Tax ID# as long as the Trust has not been sub-divided.	Merlin Case
8/24/2009	12:06 PM	TC to Mrs. Brunsting to see how she is coming along on the to do list. She said she has most of the info except Chevron, they forgot to inform them of the death. So she is waiting on a ltr from them and then she will bring it in. I also reqd copies of payouts on the life ins policies and copy of the check she recs each March on her annuity at MetLife. She said it would be easier for her to bring it all in so I told her I'd make copies when she comes in and give her orig back. llm	Leticia Meador
7/29/2009	5:44 PM	CLF caled and talked with Ms. Brunsting. She is ok to use the HCAD value. She says its low but its not 250K low. CLF told her that its fine. CLF	Candace Freed
7/27/2009	12:22 PM	Nelva Brunsting called for CLF (LVM @ 11:36am) re 2009 HCAD for HS value. Will that suffice for realtor's opinion on FMV for HS? Pls call her. EM CLF. sk	Summer Peoples
7/22/2009	4:32 PM	CLF	Candace Freed
7/22/2009	9:52 AM	t/c w/ Mrs.B. She requested, and I gave her, Laura Jungeblut's address for her to send Laura a card. She said that they thought so much of Greg and he was so helpful.	Susan Vacek
6/29/2009	12:12 PM	Ms. Brunsting called and needs to get an appraisal for the Value of a house. She called a realtor and was told there would be a charge for the appraisal and Candace has said that this could be done at no charge. Ms. Brunsting wants to know who Candace uses that does this for no fee. Pls. call.	Merlin Case
6/8/2009	4:52 PM	Rec'd DOD values fm Darlene of Edward Jones. EM LLM & cc CLF. sk	Summer Peoples
6/2/2009	5:04 PM	Rec'd signed engage ltr. She already pd 1/2, so no pymt was incl. sk	Summer Peoples
5/28/2009	12:53 PM	Mailed engage ltr for PM2. No amt due at this time because 1/2 pymt (\$1,750) already made. Balance due: \$1,750. sk	Summer Peoples



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5/26/2009	1:47 PM	CLF called Darleen Back. Wanted to call the home office to find out how they would be filing the new account so that she could trade. cannot do so if left in Elmer's social for now. I told her that it needed to be titled in the name of the trust with Nelva as Tee for now and we would be splitting the trusts at a later date. She asked whether there were restrictions on investments under the trust? No, who were the tees (Nelva alone) and who were the successor Tees (Anita and Carl); Also advised her that the Trust at this point is technically irrevocable for Mr. Brunsting's share and that once we split it Ms. Brunsting share is revocable. For now it's going to be in her Social Security number until splitting so that she can trade and manage the funds as she needs to.	Candace Freed
5/26/2009	7:34 AM	From: Merlin Case Sent: Friday, May 22, 2009 12:15 PM To: Candace Freed; Susan Vacek Cc: Leticia L. Meador; Summer Kennan Subject: Brunsting Trust, Darleen w/Edward Jones 713-464-6071 Candace, Darleen sent Ms. Brunsting an account form and Mrs. Brunsting just signed it and sent it back. She did not fill in any information. Darleen needs to talk to you to get the info to fill in the form. Pls. call.	Summer Peoples
5/21/2009	2:48 PM	Rev'd engam't letter for PM2. CLF	Candace Freed
5/21/2009	2:38 PM	CLF called Darleen Back again. She said they opened a new Trust acct in the name of the LT and used Nelva's social. I told her that is fine. We will provide for the split of the account at such time they will get a letter of what or which to move into a new DT acct. CLF	Candace Freed
5/12/2009	7:56 AM	Darleen fm Edward Jones called for CLF (LVM on 5.11.09 @ 4:15pm) re: IRS doesn't allow the dec'd grantor's SSN to cont to be used. Pls call her. 713-464-6071. EM CLF & SSV. sk	Summer Peoples
5/11/2009	4:40 PM	CLF met with Nelva Brunsting. PM2 and SUBtrust Funding. Paid \$1750.00, Iowa Property needs to be valued and Life Insurance is unknown in value. Client still has not located the original bound Trust portfolio that was restated in 2005. Duplicate Original was bound with Binder Clips and a copy made for the 3 ring binder. CLF instructed client to store the original in the safe deposit box. Awaiting additional asset info. CLF spoke to Darleen at Ed Jones and Ms. Brunsting gave permission to discuss the estate with her. they wanted to know what ss# to put on LT account. CLF told them that likely PM2 and would be splitting getting a Dt Ein. However, if they needed to do so they could have in LT name and put Nelva's social but she preferred that we do all at the same time. CLF confirmed that Nelva in either case would be able to manage the investments and it was confirmed that yes, as a trustee she would. CLF	Candace Freed
5/6/2009	1:34 PM	Nelva Brunsting returned CLF's call fm yesterday (LVM @ 9:15am). She needs to make 5/1 appt w/ CLF. I called her to sched 5/1. She wanted to come in tomorrow, but CLF has not availability on her calendar. Set 5/1 for Mon, 5.11.09 @ 2pm. I told her what to bring to appt and gave her the new office address & location. EM CLF. sk	Summer Peoples
5/5/2009	3:20 PM	ACCT: 309 MSG: 2550001047 CALLER ID: 7134644391 TAKEN: 05/04/2009 11:58:12 SAADDELIVERED: 05/04/2009 11:59:25 SYS! TO: To: CANDACE L. KUNZ-FREEDFR: Nelva Brunsting Co: ClientPh: (713)464-4391 ad: 13630 PINE ROCK Houston, 77079 Re: CALL FOR PERSON REQUESTED HAS QUESTIONS ABOUT HER HUSBAND'S DEATH CERTIFICATE	Candace Freed
5/5/2009	3:20 PM	CLF called and lvm that she tried to call last night and that she could hear Nelva but Nelva could not hear me. CLF	Candace Freed
4/6/2009	2:18 PM	Rec'd file fm storage. sk	Summer Peoples
4/6/2009	7:59 AM	MCC ordered file fm storage. sk	Summer Peoples
4/3/2009	11:11 AM	4/3/2009 11:09 AM Note Elmer Brunsting DOB: 9/29/1921 SS#282-32-8905	Candace Freed
4/3/2009	11:03 AM	CLF rec'd message from the AS that nelva had called. Elmer passed away on April 1, 2009. Calendar to call in a few weeks to set an appt. CLF	Candace Freed
7/16/2008	11:43 AM	Rec'd pymt of \$250 for docs and mtg w/ CLF on 7.1.08. sk	Tonya Lyrock



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7/1/2008	5:45 PM	Nelva, Elmer and one son came in for Nelva to sign the new COT which states that Elmer is no longer able to handle his financial affairs and doctors letter were attached. Also, signed Appt of Succ Tee. Nelva is to make sure that she can find at least one (if not both) of the Restatement to LT and the amendment done. Old original documents are in the fire safe in 5th floor workrom in the black cabinet 2nd drwr still. DO not destroy until confirmed they have found the Restated trust and Amendments as Mr. B is NCM. Nelva did not have a check book therefore she will mail the check for \$250 to us. CLF	Candace Freed
6/30/2008	10:17 AM	Nelva Brunsting called to sched appt w/ CLF. 4 appt set for T, 7/1 @ 3:30pm. EM CLF. sk	Tonya Lyrock
6/16/2008	8:41 AM	Received files from storage.	Tonya Lyrock
6/11/2008	11:19 AM	CLF talked w/ AEV re 2 doctors ltrs. CLF is still going to meet w/ client today and just amend the docs accordingly. I called Nelva Brunsting to tell her same, and she offered to just postpone the mtg until she rec'vs the 2nd ltr. I asked CLF and CLF got on the phone to talk w/ Nelva about whether or not they are going to meet today. sk	Tonya Lyrock
6/11/2008	10:38 AM	Per CLF, I called Nelva Brunsting to inquire about the 2 doctor's ltrs. She says she has one but the second one is hard to get because the office is busy/the nurse isn't that helpful. She thinks that she might need to write a ltr to that doctor to request a ltr. I told her that I would let CLF know about this (she's in ct at a hrg) and we would get word to Nelva by noon if we need to resch appt since we don't have the 2 ltrs. She needs to know by noon because her son who is succ Tee is coming w/ her to the mtg, so she'll have to tell him. EM CLF. sk	Tonya Lyrock
6/10/2008	5:11 PM	Requested file from storage, Box # 12 & 370	Tonya Lyrock
6/4/2008	10:45 AM	Spoke to Nelva Brunsting and she was upset that she was told that she could have to work with someone knew. Most of her frustration is likely delalong with Mr. B who has alzheimers. I asked how he was and she said he had gotten worse. She wanted to change the Succ Trustees to Anita and Carl as Co Instead of Carl and Candace as Co Tees since Anita seemed to know more abt the trusts. CLF told her she would make the change and asked whether she had gotten doctors letters yet re: the ability or inability of Mr. Brunsting to handle his financial affairs. She will be getting the Doctors letters and needs new COT for the sole acting tee with the doctors letters attached. CLF wrote it up and they are coming in on June 11th to sign it. CLF	Candace Freed
6/4/2008	10:02 AM	Nelva Brunsting called again for CLF. I told Nelva that CLF asked me to call her and that is one of the calls I was going to make today. CLF suggested that Nelva meet w/ RPC for 4-appt. Nelva said, "Ma'am, how many attys do you have there? I have already talked w/ CLF and thought I'd be mtg w/ her. I'm getting tired of being shuffled fm atty to atty." I explained that CLF does Tr Admin & Estate Admin and RPC does EP. CLF would brief RPC on the particulars so that he would know what is happening. She said she would still have to "explain everything all over again!" Oh my! So I offered to let her talk w/ CLF and see what she'd recommend. I passed call to CLF. sk From: Candace Freed Sent: 06/03/2008 10:27 AM To: Summer KennanCc: Ronald P. Chln; Cathy DriskellSubject: RE: Nelva E. BrunstingSummer, Please call her and set an appt No. 4 with Ron. I will fill him in. I am not sure what changes she wants to make. Her husband and she were in recently. He is already ncm I think. Suffers from Althelmer's. We have her old originals - stored in one of the fire safes in the office as she could not locate her updated documents and I did not want to destroy the old until she called and said she had found them. Thanks Candace From: Summer Kennan Sent: Tuesday, June 03, 2008 10:23 AM To: Candace FreedSubject: FW: Nelva E. BrunstingAny clue who this is regarding? (So I can look up in ACT before I call client back.) Thanks. From: Bridget D. Gonzalez Sent: 06/03/2008 10:00 AM To: Summer KennanSubject: Nelva E. BrunstingShe was wanting to schedule a appointment with CLF due to a few changes. I wasn't really sure on how or what was needed. Her number Is 713-464-4391	Tonya Lyrock



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

11/6/2007	6:50 PM	CLF spoke to Nelva. She wants to take Elmer off her MEDPOA and also wants to change per DGPOA. His cannot be changed at this juncture since he is likely ncm. CLF	Candace Freed
9/19/2007	9:55 AM	Spoke to Nelva this mornign and Elmer seems to ge getting worse as to the dementia. I advised her to go ahead and get the 2 doctors ltrs that state he is unabel to make financial decisions. She is brigning the 2005 document originals to be reviewed by CLF to make a few changes. She would like to replace Amy with Anita and I also suggested we remove Elmer in her docs as well as long as we were there making the changes for them so that he is not listed as first agent. She agreed this would be more appropriate at this point.CLF	Candace Freed
8/15/2007	3:03 PM	Confirmed appt for 8/16	Candace Freed
7/31/2007	10:47 AM	Rescheduled Apt. for 8-16-07 at 2PM. (tel)	Tonya Lyrock
7/23/2007	4:51 PM	Confirmed seminar reservation	Candace Freed
1/12/2005	1:01 PM	They came in today to sign a restatement. Mr. Brunsting broke into tears and almost lost it every time he would talk about his mom and the living will. I got the impression from Mrs. B that this happens quite quite often.	Cathy Driskell
2/1/2003	1:20 PM	06/21/2001 1:41p - BMS - mailed LT deed to Harris County to record.06/21/2000 5:25p - AEV - casual conversation about the funding at death with elmer as a result of our newsletter.06-25-1999 08:44a- AEV - ref him to zuelhke for real estate work (d/t for daughter's house)02-07-97 15:24 - CED - Printed notepad02-07-97 15:11 - CED - drafted ILIT02-04-97 15:10 - CED - TC w/Greg Jungeblut. Prepare ILIT for them to come in and sign. Anita as Trustee, Carl-First, Amy-Second, Distribution same as LT. \$300.0011-14-96 10:52 - JHD - Printed all data11-14-96 10:34 - JHD - Printed all data10-11-96 11:48 - AEV - considered setting up 400k farm in iowa into an flip (suggested by the ml broker Ms. Wise) -- quoted 5k for flip and add'l costs -- he will just go ahead and gift liquid amounts to klds to get the estate down. He will not qualify for 2nd to die.09-30-96 17:20 - AEV - tc with Mr. B: all about ilits and heritage trusts for his grandkids (500each)Originated by: (CED-Cathy Driskell) on 09-30-96 - 15:32----- -----Please call him at home after 4:00 p.m. today. 464-4391.He has discovered that his estate is more than he thought -- a little more than \$1.4 million. He would lke to discuss tax saving methods. Seems open to other type trusts, such as heritage trusts for grandkids?09-26-96 15:03 - JHD - Confirmed appt. with Mrs. Brungsting for 9-27-96 at 2:30.09-23-96 08:56 - MLC - sent confcard	Susan Eckles



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

11/18/2010

8:08 AM

E-mail sent

Email to all Brunsting Sibs re: Moms DOC Visit

Candace Freed

From: Candace Freed

Sent: Wednesday, November 17, 2010 4:39 PM

To: 'occurtis@sbcglobal.net'; 'at.home3@yahoo.com'; 'Anita Brunsting'; 'Carole Brunsting'

Subject: Nelva Brunsting

Amy and Family, Thank you for the update on your mom, Nelva Brunsting. The purpose of the conference call and the suggestion that Ms. Brunsting be evaluated was based solely on conversations that I had with Ms. Brunsting and to let you all know that I had concerns based on those conversations. If she has been evaluated by her physician and you as a family are comfortable with his or her diagnosis, then you have addressed the concerns that I had. I appreciate your letting me know the opinion of the doctor. I hope your mom is doing well and she continues to improve.

Please let me know if I can be any further assistance.

Very truly Yours,

Candace L. Kunz-Freed
Attorney at Law



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

11/7/2010	7:30 PM	E-mail sent	email from Amy T - Daugh re: moms evaluation at the DOC	Candace Freed
			From: Amy Tschirhart [mailto:at.home3@yahoo.com]	
			Sent: Sunday, November 07, 2010 7:33 PM	
			To: Candace Freed	
			Subject: Re: Brunsting trust	

Hi Candace, I took mom to her appointment with Dr. White on Friday. Carole insisted on being there also since she has medical power of attorney. Dr. White has known our family for a long time and when he realized that he was in the middle of a family dispute, he was reluctant to make a decision on mom's competency. He spoke with mom and encouraged her to let someone else handle her finances. He also said she should not be driving anymore. I asked him to write you a letter stating whether mom was competent or not and he said he would call you, but he'd rather not write a letter. It is his opinion that at times she might be competent, but at other times she is not. I thought there was a more precise method of evaluating competency based on observed behavior. Dr. White's phone number is (713) 978-7975 if you need to reach him. After you talk with him, please let me know what you would like us to do. I can make an appointment with a neurologist if you need a more definitive answer. Thanks, Amy Tschirhart (830) 625-8352 daytime (830)822-2388 cell

11/2/2010	9:32 AM	Field Changed	Field changed Field Client DOB changed from "10/07/26 7:00:00 PM" to "09/28/21 7:00:00 PM"	Summer Peoples
11/2/2010	9:32 AM	Field Changed	Field changed Field Spouse DOB changed from "09/28/21 7:00:00 PM" to "10/07/26 7:00:00 PM"	Summer Peoples
10/28/2010	11:30 AM	Field Changed	Field changed Field Last Results changed from "" to "See CLF for this Client. skip"	Summer Peoples



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/25/2010

10:21 PM

Call Completed

Candace Freed



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

teleconference with Brunsting Children
carol, anita, amy and candy. 1 hour 10/25/2010

advise them the reason for the call was that I was increasingly concerned about Ms. B's last few change requests to the trust. In speaking with her it seems that she is not recalling what has been done in the last few months and what was not. The purpose of the call was to let them know I was concerned and that I understand their mom is going through treatments for pneumonia and sometimes memory can be impaired by medication or it could be a sign of something else. I was asking that they get together and that with the trust as it is at this point and with the current POA for finances, that they work together to determine how best to help their mom at this time.

It seemed to me that Carol did not want to Oust mom from the position of trustee. She would like a doctors opinion before doing so. I said I thought it would be a good idea. The main thing is to help Ms. B handle things if she needs it at this point and if she is willing to allow that perhaps what is in place will suffice with a bank account that Carol has access to in order to help MS. B. pay bills etc. Carol seemed put off by this and she thinks mom has selective memory if she does not want to deal with explanations.

Anita and Amy both seemed concerned about signs they have seen as well as to whether Ms. B is having a difficult time (forgetting who she has talked with, whether she has seen Carl lately and whether she has requested the transfer of funds from Edward Jones to cover checks she is writing.

All seemed concerned abt moms driving and I suggested that perhaps coming from the Doc to Ms. B would be more palatable. Nonetheless, I had to continue to redirect conversation as to why we were all on the phone together and that was to tell them my concerns and that they should talk with their mom and see what they all agreed was in her best interest.

There were numerous concerns about whether Ms. B should be making payments or advancing money to her son Carl for his care. Carol was adamant that it was mo ms choice and that they should all support that and Carl is to come home on Tuesday and needs care givers for a while abt 8 hours a day and that her mom could pay for that. Discussion became about the sister in law

and why could she not help by applying for disability or aid and that their mom is compelled to aid the dil for the sons sake etc.



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/25/2010	12:07 PM	E-mail sent	Resch 5/1 teleconf appt I EM the kids to inform them of the ph# to call and the access code to dial for today's teleconf call that has been resch fm last wk. The call is sched for 5pm CST. skp	Summer Peoples
10/14/2010	4:03 PM	Call Completed	Schedule a teleconf call I called Nelva Brunsting to give her the toll free 800 number for Monday's teleconf call. She said that her son Carl may not be able to attend since he is sick w/ encephylitis (or however you spell it) and is not doing well. I told her that one of her dau's already told me this. (Apparently Nelva forgot that she has already informed us of this and made changes to her LT when she removed Carl fm serving as a succ Tee.) Nelva asked what this teleconf mtg is abt. I told her it's abt the changes she wants to make to her LT and to discuss this w/ the kids. I told CLF that she will need to call Nelva 5 mins or so before the teleconf call to remind her to call in at 6pm. I also EM the four daus the conf call info and asked that they talk w/ each other to make sure that they all know about the conf call and ph # to call in, etc. skp	Summer Peoples
10/13/2010	11:15 AM	Call Completed	Carole called and wanted to know what the meeting was about I told her that it was about her moms condition and what the trust says now and what can be done at this point. She said she thought that changes were made and it was done and that she was fine with it. I told her that based on my conversation with her mom and that she was wanting to change things again after talking w/her that she would see a need to meet regarding her moms condition .She said she was welll aware of her moms condition and that she thought it was all taken care of. I told her that its not and I highly recommend she be a part of this meeting. I also thought that since she got on the phone and questioned why things were done a certain way and why was she not informed and put on there since she is the one in houston and the one that has to wait until her sister(s) take care of things or communicate with her to get things done. Thus, we need to discuss why mom is calling to make changes so often and cannot remember why - The email was sent to not alarm anyone. CLF	Candace Freed



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/13/2010	10:19 AM	E-mail sent	& rec'd Carole Brunsting may not be able to attend teleconf. She asked what the mtg is for? Will it be a problem if she doesn't attend? CLF advised me to respond that the mtg is re changes to their mom's LT. If they cannot meet, then it will simply mean that they have no say so in changes to their mother's LT. Rec'd EM fm dau Amy confirming Mon 2pm appt is ok for her. She also asked if they could meet sometime before 11am. I will let CLF resopnd to that question. skp	Summer Peoples
10/13/2010	8:43 AM	E-mail sent	Schedule an appt I EM the 4 kids to coordinate a time for a teleconf call next wk. I gave them 4 openings that CLF has on her calendar. THE 4 kids and mom need to coordinate a time and get w/ me on an appt time. I called & LVM for Anita Brunsting on her cell to tell her same. skp	Summer Peoples
10/11/2010	3:01 PM	Call Completed	EM sent to Anita I called Anita Brunsting & she returned my call (as I was leaving her a VM). CLF needs all Anita's siblings EM addresses to coordinate a teleconf call. I asked Anita if she could provide this info for CLF ASAP so a teleconf can be sched. skp	Summer Peoples



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/11/2010

2:30 PM

Call Completed

Candace Freed



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

Call to Ms. B with SSV regarding the changes requested.
-Called Ms. Brunsting to discuss the requested changes and concerns I have that she is making these changes again so soon.

-I asked if she recalled the changes that were made and she said no, not really. I reminded her that we have taken care of the following: Taking son Carl off and replacing him with Anita and Amy as Co-Trustees. POA with Anita and Amy as alternate. She said she did remember these. Carl has ensephylitus.

-I reminded her of the early distribution modifications that were made and she said yes but did not recall who they were to. Were they to Carl? I told her Candace and Carol. Note: She did make a gift to Carl but I am not certain whether she made it an early distribution or advance on his trust share.

-I explained to her that she is my client and I am concerned about the changes she requested at this point and that perhaps at this time, based on our conversations, that its best not to make any changes at this time, to have a family meeting via telephone and make a determination of what needs to be done, at this point, if anything. She said that sounds fine and she appreciates it. I asked how Carl was doing and said that it had been a few days and that she had talked with him on the phone. He can draw now and although she talked with him it was difficult to tell how well he was progressing and that it will be a slow process. He is in rehab now and she is not sure when he will be going home.



-I suggested that the family meeting could omit him due to his condition and that we do not want to cause any undue stress on him and his personal recovery. She agreed. I did tell her that we would contact one of the children who is in contact with Carl (she said it should be Carol as she goes and checks on him every other day or so) and that she would know best whether he was in any shape to have such conversations.

-I also suggested that it is important for the family to talk together and discuss her needs and what needs to be done, if anything at this point regarding her finances and her trust/estate plan and how the family can best serve her needs.

I asked her for contact information for the children so that summer can contact them and set a time and date for the conference call. She said that would be fine and thank you.



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/11/2010	10:18 AM	Call Completed	I spoke w/ Nelva Brunsting and advised her that unfortunately CLF will not be able to make th appt today to meet w/ her at the house but CLF would like to call her at that time to discuss some options. She was fine w/ that. I didn't say anything more as to why the appt was CAN or what the discussion would be about. EM CLF. skp	Summer Peoples
10/7/2010	1:42 PM	Call Completed	Ms. B called back She would like to make some changes to the trust. She would like to name Carol and Anita as Co-trustees and change the POA (Fianncial) to Carol. I asked her if she was being compelled to make the change and she said no. This is what she wanted. I told her Ok and that I would have the documents drawn up and come by on Monday at 2pm. CLF	Candace Freed



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/7/2010

12:28 PM

Call Completed

Candace Freed



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

Call to Nelva Brunsting by CLF to discuss issues of which Anita was concerned

October 7, 2010 - Spoke to Nelva. I asked her if it was Ok to talk since she has a caregiver coming in to help her and I wanted to ensure that it was an appropriate time to talk. She said yes that her Daughter Carol was there helping her out. I told her that Anita had called She confirmed that she was in the hospital for a short Bit and that she was home and on breathing treatments. She did not understand why Edward Jones did not transfer the funds. I told her that she should contact Ed Jones and ask them to check why the funds were not transferred and that it cost her in bank fees. She said she would. Abrubtly a voice came thru also on the line unbeknost to me that she was on the line was Daugh Carol who stated that from her checking that she was not sure that Ed Jones had gotten an instruction and that even if they did, that there would have been enough time to sell anything and sweep funds to cover the check. I recommended to ms. B that if she wants to make the gift that is her decision and I have no opinion as to the gift. However, I would recommend that she make the check payable 13K to Carl and 12 to his wife so that there is a paper trail for the IRS and that she stays below the gift tax allowance. She said she understood and she said that she should have done that in the first place.

Ms. B then said that Carl has ensephlytis and that he needs to be taken off things. I reminded her that we had already taken care of these things a few weeks ago and she said, Oh thats right. Carol piped up and said that while it was taken care of that Anita and Amy were put on as the Succ tees and that she was the one that was here and close by and that she is having to wait on answers from the Sibbs to take care of things here. She needs to be the one named on there as the Succ Tee with Anita. I told her that it was up to Ms., B and that I am not certain as to why it was decided by anyone how the tees should be named the last go around but that it was always something that could be modified. I suggested that if Ms. B wanted to resign as tee she could name anyone she wants and that its revocable by her ant anytime. I also suggested an account that sweeps cash into it periodically for her to have to writer her own checks for things but then the trustee can take care of writing out large checks and bills etc for her if she needs help with that. She said that she liked the idea of that. I suggested that Carol be on the account with mom since she is local. Carol stated that while its

well and good that she thinks she should be CoPOA. I explained that companies do not like Co-POAs b.c they have to be able to rely on

Page 27 of 38

Created 3/22/2012 at 2:56 PM

V&F 001194



Notes/History

Candace Freed,
1.1777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

10/6/2010	6:00 PM	Call Completed	<p>Call to Anita Brunsting Cell. returned. Anita is concerned about Her mom. She was placed int he hospital a few weeks ago (her mom got phneumonia which with her comppromised lungs is not that unusual, however, she mentioned ot her other sister that she was stressed out over the pressure she is getting from Dll (wife of her son that is in the hospitla - Carl) that she should be helping them out as to medical bills and the like. She was concerned about what her mom did in that while it was a single check for 25K to her son Carl for them to use - aside from the gift tax implications that CLF had already discussed with her mom her concern was that mom did not even make sure the money was in the account and the check bounced. the worst was that mom could not remember if she even called the broker to tell him that she needed money transferred over to her checking account to cover the check. She is concerned abt moms ability to handle things and mom has expressed concern abt the pressure she is feeling.</p> <p>I went over the options with Anita and suggested that if mom is willing to resign, that it is the best option for her to accept the resposibility for now and that she can open an account in moms name alone, w/her as a co-signer, and POD to the trust so that mom can have the freedom to write checks but that it will be monitored.</p> <p>Anita advised that Ms. B was having a hard time getting around. I suggested that I would go to Ms. B's house since she lives so close and take care of things at her instruction. I explained that I would need to discuss what this menas with Ms. B first before I prepare any documents. I also would be able to ascertain her condition at signing as well.</p> <p>CLF awaiting word from Anita as to how to handle. CLF</p>	Candace Freed
10/6/2010	4:45 PM	Call Received	<p>Anita Brunsting (dau) called (LVM @ 12:41pm) re questions abt POA & gifting. Mom gave bro \$25K instead of paying medical bills directly. She has questions abt the POA clause in LT. Pls call. 361-550-7132. EM CLF. skp</p>	Summer Peoples
9/2/2010	5:22 PM	Letter sent	<p>Distr form ltr mailed CLF drafted distr ltr for Nelva Brunsting to sign and send to Carol Brunsting. See T:\ for copy. skp</p>	Summer Peoples



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

9/2/2010	1:37 PM	Call Received	Nelva Brunsting called for CLF (LVM @ 10:38am) re dau Carol who wants \$20,000 donation against her heritage. Pls call to discuss. She isn't sure how this was handled for her dau Candy. EM CLF. skp	Summer Peoples
8/17/2010	9:58 AM	Field Changed	Field changed Field Spouse Type changed from "" to "Deceased;Living Trust"	Summer Peoples
8/17/2010	9:58 AM	Field Changed	Field changed Field Marital Status changed from "Married" to "Widowed"	Summer Peoples
8/17/2010	9:57 AM	Field Changed	Field changed Field ID/Status changed from "" to "Client"	Summer Peoples
7/29/2010	10:11 PM	Contact Linked	Linked to company Elmer H. Brunsting	Susan Vacek
7/29/2010	8:45 PM	Field Changed	Field changed Field ID/Status changed from "Living Trust" to ""	Susan Vacek
7/14/2004	2:10 PM	Field Changed	ID/Status - Living Trust	Candace Freed

Notes

Date	Time	Regarding	Record Manager
2/8/2012	9:34 AM	gave the recorded deed paperwork to SKP. bms	Beth Spiller
1/25/2012	10:44 AM	Survivor's Trust deed is back from being recorded in Harris County.	Beth Spiller
10/18/2011	9:53 AM	In sorting thru a storage box for another client file, I came across an envelope for this Client. I have added to the PM file we have here on site. skp	Summer Peoples
8/4/2011	9:34 AM	Copied Brunsting LT and related First AMN & QBDs for Jim Blackburn, atty for Carl Brunsting. Carol Brunsting is supposed to be dropping by the office to rev'w these docs prior to us mailing them to Jim. I have the envelope of the copied LT and docs on my desk by my inbox. EM MCC & cc CLF. skp	Summer Peoples
7/27/2011	12:52 PM	Review of Engmt Ltr for consult re: PAT trust amendments for Nelva Brunsting.	Candace Freed
7/26/2011	8:34 AM	Engage ltr (hourly) for rev'w. skp	Summer Peoples
7/20/2011	1:25 PM	CLF needed file fm storage. It was just abt to be sent to storage. Currently, everything in it that needed to be scanned has been scanned. I have put the file in CLF's file cabinet in her office. It will likely need to be added to another box later, as it will be larger. I have removed it fm the list on Box 538 and will add another file there instead. skp	Summer Peoples
6/1/2011	8:24 AM	File previously scanned and was boxed to send to storage when Client called again for add'l work. File is now sent to storage in Box 538. skp	Summer Peoples
2/15/2011	11:44 AM	Drafted 3rd QBD & 2 fndg ltrs for CLF's rev'w. skp	Summer Peoples
7/28/2010	9:01 AM	Rec'd ck for \$250 fm Nelva Brunsting. I'm thinking that she submitted this to pay for the De Koster fee. We already added the \$250 De Koster fee to our last Invoice (dtd 7.13.10) mailed to her. She pd in full for this. I told her that I would shred this \$250 ck. She also asked what she needed to sign (US Deeds). She said she will come by the office to sign before a notary. EM CLF & cc MCC. skp	Summer Peoples



Notes/History

Candace Freed,
11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

7/21/2010	1:25 PM	Rec'd full pymt (\$290.81) fm Nelva Brunsting. skp	Summer Peoples
7/20/2010	3:07 PM	CLF returned call to Nelva's daughter Anita. Asked how she was doing. She is feeling okay. She has cancer on the liver but its the lungs that she has issues with that keep her treatment of the liver cancer from being able to handle the treatments. Worse over, her Brother Carl has ensephalitus and is in the hopsital. 3 weeks now. She is concerned for several reasons: 1- Not sure what the outcome for the brother is going to be or if he will recover. This may be problematic in that they are not certain his wife will not take off with the money or actually use it for his care 2-He is the first agent under POA 3-He is on the MEDPOA fo rmom 4-He is a Co-Tee w/Anita Comments from sil (Carl's wife) to Nelva was that she wished she would go on and sitrbute Elmers share of the trust since Carl had said he wanted her to have something and if Carl dies then his daughter would get it all. I suggested the following but that it needed to come from Nelva - 1. Apit Succ Tee changign Carl out to another co tee with Anita 2. PAT QBD so the Co-tee can flips Carl's trust into a supplemental needs trust have the Co-Tees have the right to name their own succ tee of Carl's trust should he fully recover 3. Nelva can make unlimited gifts to Carl of Doctor bills paid directly to the provider Dtr or Hospi gift tax free 4. Med POA updated to add Anita and Take Carl off (move him down at least) - He is currently listed as No.1 I recommended these be done in a timely fashion since Ms. B is dealing with her own health issues. CLF	Candace Freed
7/20/2010	11:58 AM	Anita Brunsting called for CLF (LVM @ 11:12 am). 361-550-7132 calling on behalf of mom Nelva. If you'd give me a call, I'd appreciate it. EM to CLF cc SKP. lhm	Leticia Meador
7/13/2010	4:36 PM	Mailed original opinon ltr fm Iowa atty, his Invoice (\$250) and our Invoice (\$290.81 - which includes his \$250 fee, as we are paying this directly and Nelva Brunsting is to reimburse us). Also Incl return enve. Nelva is to call me to arrange a time for her to come by the office to sign US Deeds so we can mail that for recordation. skp	Summer Peoples
7/7/2010	4:18 PM	Rec'd full pymt (\$395.87) fm Nelva Brunsting for hourly fees. skp	Summer Peoples
7/7/2010	8:47 AM	Rec'd Opinion letter from Iowa Atty that Dt will qulaify under definition of testamentary trust and thus will allow for an Irrev trust to own the Cropland. Email to SKP. Please prepare a bill for the opinion letter received. Keep a copy of the opinion letter for our files and send Ms. B the original with a bill from us. Do a check request to Joanne for the law firm fee and pay the bill for her and we will get reimbursed by her. We need her to come in and sign the deed from the LT to the DT and notarize. Then send the deed back to US Deeds for recording. thanks	Candace Freed
7/1/2010	12:07 PM	Rec'd VF copy of signed receipt & distr fm Candace Louise Curtis. Filed in file. EM CLF. skp	Summer Peoples
7/1/2010	10:26 AM	Mailed Invoice (\$395.87). Incl return enve. skp	Summer Peoples
6/25/2010	1:52 PM	CLF called Rich to explain the issue. They are closed on Fridays. Left him a message. Ext 105 - Left him a message that it was my recommendation that we get n opinion letter from an atty in IOWA and that if he had already gotten one that we would like a copy of it for the file. Otherwise we recommneded that she get one. CLF	Candace Freed