

08112015:1020:P0216

EXHIBIT

A

COPY

UNOFFICIAL

## PM TRUST REVIEW MEETING

Signing Date & Time	
Wed. Aug. 4th	
2:pm.	
Fee:	_____
Paid:	_____
Mail:	_____

Client Name: Brunsting, Nelva

Date: 07/30/10 Estate Size: 2 mil±

IRA: Husband - N/A Wife - \_\_\_\_\_

Current Address/Phone: 13630 Pinelock Hwy TX 77079

Date of Trust/Restatement: \_\_\_\_\_ Previous Amendments? Yes.

Subtrust Funding Done previously? Yes. DT & ST.

AMENDMENT:  QBD(PAT)  Other  Instr Ltr  HCPOA

ApptSUCCTee/HIPAA  ExtPOA  COT  POA  DIR

Anita Kay Riley & Army Ruth... Co-trustees  
or Successors of them. Then Trust

Distribution Change (QBD):

PAT QBD

**IF PAT QBD then:**

Each beneficiary Trustee of Own Trust:  yes  no

except for Carl, Anita & Armie as Co-trustees for Carl  
(except they have rt to name Carl as army)  
Distribution of PAT: need to Low Succ Tee

Same as LT except need language  
about the last amend (QBD) use early distr.

08/12/2015:1020:P021B

\_\_\_\_ **Specific Distribution:**

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_ **Ultimate Distribution:**

\_\_\_\_\_  
\_\_\_\_\_

**HEALTH CARE DOCUMENTS:**

1<sup>st</sup> Agent: Carol

2<sup>nd</sup> Agent: Anita

3<sup>rd</sup> Amy

IRA TRUST: \_\_\_\_ yes \_\_\_\_ no For whom? \_\_\_\_ husband \_\_\_\_ wife

Trustees upon disability of Trustor or spouse: \_\_\_\_\_

Each beneficiary Trustee of own trust? \_\_\_\_ yes \_\_\_\_ no

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SS# of Surviving Spouse/Beneficiaries: \_\_\_\_\_

**FUNDING:**

Real Estate \_\_\_\_\_

Which property has NO MORTGAGE? \_\_\_\_\_

\_\_\_\_ Recording HS Deed

\_\_\_\_ Apply for HS Exemption

Tax-deferred Assets \_\_\_\_\_

\_\_\_\_ Bank & Brokerage Accounts

\_\_\_\_ Safe Deposit Box

\_\_\_\_ Life Insurance

\_\_\_\_ Stocks and Bonds

\_\_\_\_ Oil & Gas Interests

\_\_\_\_ Motor Vehicles

\_\_\_\_ Credit Union Accounts

\_\_\_\_ Sole Proprietorship Assets

\_\_\_\_ Partnership Interests

\_\_\_\_ Promissory Notes & Mortgages

\_\_\_\_ CDs

\_\_\_\_ Annuities

**Additional Documents:** \_\_\_\_\_

**NOTES:**

Needs new DFPDA order

Anita

Carol

Amy

Any Name Changes for children? \_\_\_\_\_ Any children Predecease? No.

If Yes, who: \_\_\_\_\_

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FEES:

QUOTED: \$ \_\_\_\_\_ (Plus Expenses)

AMOUNT REC'D: None DATE: \_\_\_\_\_

BALANCE DUE: \_\_\_\_\_

DOCUBANK? \_\_\_\_\_

Cost per QBD 1200.

Hipaa Pkg 250 - med POA  
D.F.P.O.A. 150.-  
Appl. of Succ TEE  
New Card.

Courtesy discount \$150.-

Cy

Anita - called  
Carl has encephlytus  
amendments to trust

Anita + Annice as Co.tees

change list under ME

Carol  
Anita  
Annice

financial P.O.A

Anita  
Carol  
Annice

Amend to trust / PAT's w/ Annice  
to correct Supp Needs to be  
Co.tees.  
sp needs?

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**From:** Anita Brunsting  
**To:** Candace Freed  
**Sent:** 10/6/2010 8:19:06 PM  
**Subject:** Brunsting Family Trust

Candace,

I spoke to mom tonight and she agreed to resign as trustee and appoint me as trustee. I told her that you would be contacting her to re-explain things and make sure she understood what was happening.

If you have any questions, my cell is 361-550-7132.

Thanks,  
Anita

08/11/2015 10:20: P0222

V&F 001277