

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Tuesday, January 31, 2012 7:55 AM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: FW: Farmland LLC possibilities
Attachments: Untitled.PDF - Adobe Acrobat Pro.pdf

Candace,

this is the letter from our lawyer in Iowa about ownership of the farm.

Anita

From: Rich Ridders [mailto:richr@kk-cpa.com]
Sent: Friday, January 27, 2012 4:40 PM
To: Anita Brunsting (akbrunsting@suddenlink.net)
Subject: Farmland LLC possibilities

Anita,

Wanted to get you a copy of this. I mentioned it to you on the phone but wanted you to see John's findings.

I will need some more information for the life insurance trust like the complete name, date formed and other things.
I will let you know everything I need.
Do you have a trust document for that trust?

Rich

Richard Ridders, CPA, MS, CSEP
Kroese & Kroese, P.C.
540 North Main
Sioux Center IA 51250
Bus. 712-722-3375
Fax 712-722-3365
Email: richr@kk-cpa.com

"Helping You Attain Your Financial Goals"
...It's Our Commitment

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V&F 002124

Brunsting Family Survivor's and Decedent's Assets

Asset	# shares	price/share *	Amount*	*values as of 1/20/2012
Chevron/Texaco-decedent	609.6515	106.89	\$65,165.65	
Chevron/Texacos-survivor	37.131	106.89	\$3,968.93	
Chevron - Decedent	612	106.89	\$65,416.68	
ExxonMobil-Decedent	583	87.49	\$51,006.67	
ExxonMobil-survivor	675.910671	87.49	\$59,135.42	
MetLife - Survivor	95	36.35	\$3,453.25	
Survivor's Trust Edward Jones			\$1.05	
Decedent's Trust Edward Jones			\$240,637.33	
Survivor's Trust Checking			\$23,611.65	includes deposit of IRS refu
Decedent's Trust Checking			\$14,765.55	Includes deposit of remainin
Misc. Coins			\$690.00	
Gold Watches/misc jewelry				appraisal pending
Total Liquid Assets			\$527,852.19	
Farm (acres)	141		\$0.00	appraisal pending
House			\$410,000.00	appraised value
Total Trust				

Summer Peoples

From: Summer Peoples
Sent: 01/31/2012 9:09 AM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Cc: Candace Freed
Subject: Invoice attached
Attachments: Invoice 1.31.12.pdf

Attached is the most recent Statement for this matter.

Thanks,

Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Telephone: 281.531.5800
Toll Free: 1.800.229.3002
Facsimile: 281.531.5885
E-mail: summer@vacek.com

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VACEK & FREED, PLLC

11777 Katy Freeway, Suite 300
Houston, TX 77079
(281) 531-5800
1-800-229-3002

Estate of Nelva E. Brunsting
c/o Anita Brunsting & Amy Brunsting, Co-Trustees
203 Bloomingdale Circle
Victoria, TX 77904

01/31/2012

Invoice # 10521

STATEMENT

Previous balance			(\$2,799.08)
Professional Services			
01/10/12	Receive and review demand letter received from beneficiary; confer with co-counsel		Candace Freed
01/11/12	Update Asset List with information received		Leticia Meador
01/13/12	Correspondence via e-mail with Clients regarding providing of accounting in response to beneficiary's demand letter		Candace Freed
01/24/12	Correspondence via e-mail with Client regarding ILIT and other issues related to the Trust, including the beneficiary's demand for accounting		Candace Freed
Total for professional services rendered		1.60	\$320.00
Credit balance			(\$2,479.08)

Billing Summary

Total for services rendered	\$320.00
Total expenses	\$0.00
Total payments and other transactions	\$0.00
Total previous balance	(\$2,799.08)
Balance Due Now:	(\$2,479.08)

**Note: If Balance Due Now is shown above in parentheses, then amount shown is balance currently in your retainer account.*

PAYMENT IS DUE UPON RECEIPT

**PLEASE MAKE CHECK PAYABLE TO
VACEK & FREED, PLLC**

V&F 002127

Thank you!

Summer Peoples

From: Summer Peoples
Sent: 02/14/2012 10:49 AM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Cc: Candace Freed
Subject: Brunsting Estate
Sensitivity: Confidential

Attachments: Invoice 2.14.12.pdf

Dear Brunsting Co-Trustees:

Attached for your information is a copy of the most recent invoice for this Estate.

Thanks,

Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Telephone: 281.531.5800
Toll Free: 1.800.229.3002
Facsimile: 281.531.5885
E-mail: summer@vacek.com

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VACEK & FREED, PLLC

ALBERT E. VACEK, JR.*
SUSAN S. VACEK
CANDACE L. KUNZ-FREED
BERNARD L. MATHEWS, III
*Board Certified Estate Planning and Probate Law
Texas Board of Legal Specialization

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
(281) 531-5800
1-800-229-3002
Telefax (281) 531-5885
E-mail Address: consult@vacek.com

February 15, 2012

Ms. Anita Kay Brunsting, Co-Trustee
203 Bloomingdale Circle
Victoria, Texas 77904

Re: The Estate of Nelva E. Brunsting and the Brunsting Family Living Trust dtd
October 10, 1996

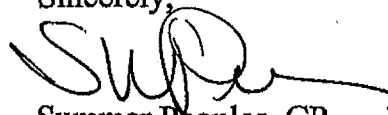
Dear Ms. Brunsting:

Enclosed please find the following documents:

1. Original recorded real estate document to be placed with your mother's original estate planning documents for safekeeping. This recorded Deed evidences that the homestead property (Lot 31, Block 4, WILCHESTER WEST, Houston, Harris County, Texas) was transferred from the Living Trust to the Survivor's Trust.
2. Hole-punched copy of same to be placed under the "Title Transfer Documents" tab in your mother's Estate Planning Portfolio binder.

Recording fees we paid on your behalf to the County Clerk will be withdrawn from the retainer you have with us. If you have any questions in this matter, please feel free to contact our office.

Sincerely,


Summer Peoples, CP
Certified Paralegal

/sp
Enclosures

cc: Ms. Amy Ruth Brunsting, Co-Trustee (w/ encl)
via e-mail: at.home3@yahoo.com

V&F 002129

Candace Freed

From: Candace Freed
Sent: Tuesday, February 28, 2012 5:58 PM
To: 'Anita Brunsting'; 'Amy Brunsting'
Cc: Summer Peoples
Subject: Please review and print and sign if the terms are acceptable to you.
Attachments: Promissory Note to DT.pdf

Let me know if you want me to make any changes to the note terms. The Interest is based on current AFR rates and is what is required for arms length transactions. Once the funds are received from the sale of the house, then you can pay the loan back to the Decedent's Trust and Rich will need to know the amount of the interest.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

The Law Firm of Vacek & Freed, PLLC has moved to our new location. Our new address is 11777 Katy Freeway, Suite 300 South, Houston 77079. We are conveniently located off the feeder of I-10, between Dairy Ashford and Kirkwood exits. We look forward to having you stop by!

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PROMISSORY NOTE

\$22,000.00

_____, 2012
(Houston, Texas)

On demand, we, ANITA KAY BRUNSTING and AMY RUTH BRUNSTING, Co-Trustees of the NELVA E. BRUNSTING SURVIVOR'S TRUST dated April 1, 2009, promise to pay to ANITA KAY BRUNSTING and AMY RUTH BRUNSTING, Co-Trustees of the ELMER H. BRUNSTING DECEDENT'S TRUST dated April 1, 2009, the sum of TWENTY TWO THOUSAND DOLLARS AND 00/100 (\$22,000.00) loaned to the said NELVA E. BRUNSTING SURVIVOR'S TRUST with interest, at the rate of nineteen one-hundredths percent (.19%) per annum, payable not later than one year from the date above as follows:

Place of Payment

1. All payments are to be made at 203 Bloomingdale Circle, Victoria, Texas 77904.

Prepayment

2. This Note may be prepaid in part or in full at any time without penalty.

Acceleration

3. It is understood and agreed that time is of the essence of this Note and that on default in the payment of any installment of principal or interest, or any part of principal or interest, when due, the holder of this Note, at the holder's election, may accelerate the unpaid balance of the principal and all accrued interest due and declare the balance due and payable immediately without presentment or demand for payment of any past-due installment of principal or interest or of any remaining unpaid balance of principal or interest, and without notice of intent to accelerate the payment of the unpaid balance of the principal or all accrued interest due on any parties to this instrument. If any Maker, endorser, or guarantor or other surety of this Note becomes insolvent or commits an act of bankruptcy or if for any other cause the protection of the holder, in the sole discretion of the holder, so requires, all liabilities of the undersigned to the holder, including this Note, will, at the option of the holder, mature and become due and payable without demand, grace, notice, presentment for payment, notice of intent to accelerate, and notice of acceleration, all of which are waived by any and all parties to this Note. The failure of the holder to exercise the holder's option to accelerate the maturity of this Note will not constitute a waiver of the right to exercise the option to accelerate at any other time.

Costs of Collection

4. The Maker will pay on demand all costs of collection, legal expenses, and attorney's fees incurred or paid by the holder in collecting or enforcing this Note on default, not to exceed the sum of \$5,000.00.

Effect of Waiver

5. No delay or omission on the part of the holder in exercising any right under this Note will operate as a waiver of such right or of any other right under this Note. A waiver on any one occasion will not be construed as a bar to or waiver of any right or remedy on any future occasion.

Definitions

6. As used in this Note, the term "holder" means the payee or other indorsee of this Note who is in possession of it, or the bearer of this Note, if this Note is at the time payable to the bearer. The term "Maker" means the undersigned, unless such signer indicates on this instrument that it is signed in the capacity of an accommodation party. If this Note is signed by more than one person in the capacity of Maker, it shall be the joint and several liabilities of these persons.

ANITA KAY BRUNSTING, Co-Trustee of the
NELVA E. BRUNSTING SURVIVOR'S TRUST
dated April 1, 2009

AMY RUTH BRUNSTING, Co-Trustee of the
NELVA E. BRUNSTING SURVIVOR'S TRUST
dated April 1, 2009

Candace Freed

From: Candace Freed
Sent: Friday, March 02, 2012 2:04 PM
To: 'Anita Brunsting'; 'Amy Brunsting'
Cc: 'Bernard Mathews'
Subject: Preliminary DOD value report
Attachments: Prelim AE 3.2.2012.pdf

Anita and Amy,

Please find attached the preliminary DOD value report. This shows a snapshot in time of the assets as of 11/10/2011. However, There is some information missing that I still need:

1. What is the contract price on the house?
2. Edward Jones account – November statement needed for Survivors Trust account and IRA
3. Deere & Co Stmt for November 2011.
4. Bluebonnet Stmt for November (or last Qtr) – I received a credit card stmt but that is the liabilities and not the assets. I need the stmt showing the account numbers and balance of the Bank account.
5. Jewelry Appraisal for the jewelry in the safe deposit Box
6. Value of the overpayment (refund from) the IRS
7. Actual payout letter for the Life Insurance Policy
8. ExxonMobil Account stmt for last Qtr of 2011 for the Decedent's Trust
9. Rental income from the Farm rec'd on October 20, 2011.

With the information above I should be able to finalize the Asset list. Please also review and ensure that I have not left off any assets.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

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V&F 002133

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BRUNSTING ST ASSET LIST

3/2/12

OWNER	ASSET CATEGORY		DOD 11/11/11 VALUES
	REAL PROPERTY		
ST (Deed being recorded by VLF)	HS-Lt 31 Blk 4 Wilchester West Sec 1, 13630 Pinerock Ln., Houston, Harris County, Texas (Value is what it is currently on the market for) Appraised value was \$410,000.00 (Actual sale price will be the FMV)	✓	\$ 469,000.00
	SUBTOTAL		\$ 469,000.00
	INVESTMENT ACCOUNTS		
ST	Edward Jones Acct# (phone call to Doug Williams for a stmt for November for both IRA and Regular brokerage account.)		\$ 0.00
	SUBTOTAL		\$ 0.00
	DRIP ACCOUNTS		
ST	Chevron Acct #124921356678 36.8438 Shares @\$107.0650/share value on date of death (basis)	✓	\$ 3,944.68
LT (ST)	Deere & Co. Acct#806578316055 (Value at right reflects value on Nelva's date of death) Basis: \$75.35/share with 9.6606 shares owned as of 8/1/2011 Reinvested shares. (Need back up paperwork for this account)		\$ 727.93
ST	ExxonMobil Acct #C0009467777; Shares 671.987460 @\$79.79/share on date of death and new basis)	✓	\$ 53,617.88
ST	MetLife Acct #124921356678 95.00 shares @33.01/share basis	✓	\$ 3,135.95
	SUBTOTAL		\$ 61,426.44

Key: H - Husband
W - Wife
LT - Living Trust

SP - Separate Property
CP - Community Property
PRO - Probate

JT - Joint
ROS - Rights of Survivorship
JTROS - Joint with Rights of Survivorship

CASH ACCOUNTS			
ST	Bank of America Ckg Acct #008519001143, accrued int of \$.00	✓	\$ 7,535.14
H or W?	Blue Bonnet Credit Union ? Acct #5805 and Acct #13332; Client to send statement		\$ 10.00
	SUBTOTAL	\$ 7,545.14	
NOTES RECEIVABLE			
ST?	\$20,000.00 note from Carol (Need date of note and value as well as interest rate for gift and or estate purposes); Per Co-Trustees, Gift tax return will be prepared - Treat as a Gift		\$ 0.00
ST?	\$20,000.00 note from Candy (Need date of note and value as well as interest rate for gift and or estate purposes) Per Co-Trustees, Gift tax return will be prepared by CPA - Treat as a Gift		\$ 0.00
	SUBTOTAL	\$ 0.00	
MISCELLANEOUS			
ST	Household and Personal Goods	✓	\$ 5,000.00
ST	Jewelry including Gold Watch and other Miscellaneous pieces (see attached itemized list) - appraisal Pending		?
H & W JT	2000 Buick LeSabre, VIN #1G4HR54K3YU229418 (Value per Co-Trustee via email 11/27/2011)	✓	\$ 5,500.00
W (ST)	IRS??- Overpayment of Taxes for Tax Year 2010		\$ 6,000.00
ST	Miscellaneous Coins (Listing attached)	✓	\$ 690.00

Key:

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	SUBTOTAL	\$ 17,190.00	
	IRA/401K		
W	Edward Jones Acct #2, 2 is bene (info recd does not show qty or acct number); phone call to Doug Williams for a stat for November for both IRA and Regular brokerage account		\$ 21.50
	SUBTOTAL	\$ 21.50	
GRAND TOTAL			\$ 555,183.08

ILIT

	LIFE INSURANCE		
Brunsting IRREV Trust	\$250,000.00, ILIT, Policy #2, 5 kids are trust benes (claim has been made)		\$ 250,000.00
	Grand TOTAL IRREV TRUST ASSETS	\$250,000.00	

BRUNSTING DT ASSET LIST

3/2/12

OWNER	ASSET CATEGORY		DOD 11/11/11 VALUES
	REAL PROPERTY		
DT	140 Acres, Iowa, Sioux County, Iowa (valued at \$1,294,617.50 on Elmer Brunsting's Date of death); Value based on Appraisal at \$13,500.00/acre	✓	\$ 2,190,000.00

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JT - Joint

ROS - Rights of Survivorship

JTROS - Joint with Rights of Survivorship

	SUBTOTAL	\$ 2,190,000.00	
	INVESTMENT ACCOUNTS		
DT	Edward Jones Acct #653-13579 (Value as of Nelvas DOD at right. Basis was set as of Elmer's DOD); confirmed acct number through Doug Williams office	✓	\$ 236,588.20
	SUBTOTAL	\$ 236,588.20	
	DRIP ACCOUNTS		
DT	Chevron Acct #125175509293 (Basis \$67.27/share was on Elmer's Date of death); Value at right estimated as of Nelva's Date of death 612.00 shares at \$107.0650/share (Conflicting info rec'd from BNY re: # of shares) Either 604.9641 or 612 shares.	✓	\$ 65,523.78
DT	ExxonMobil Acct #C0009467769 (basis \$67.99/share basis on Elmer's DOD) Value at right reflects estimated value on the date of Nelva's date of death for 583. Shares (as of June 2011) need more current sum for the account		\$ 46,517.57
	SUBTOTAL	\$ 112,041.35	
	MISCELLANEOUS		
DT	Rental income from Iowa farm -Normally rec'd payments 10/2011 and 03/2012		?
	SUBTOTAL	\$ 0.00	

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GRAND TOTAL	DECEDENTS TRUST ASSETS		\$ 2,538,629.55
--------------------	-------------------------------	--	-----------------

ST(LT)W	TOTAL 11/10/2011		\$555,183.08
DT(H)	TOTAL 11/10/2011		\$2,538,629.55
ILIT	TOTAL VALUE LIFE INSURANCE TRUST		\$250,000.00
	TOTAL 11/10/2011 VALUE		\$3,343,812.63

Key:

H - Husband

W - Wife

LT - Living Trust

SP - Separate Property

CP - Community Property

PRO - Probate

JT - Joint

ROS - Rights of Survivorship

JTROS - Joint with Rights of Survivorship

Candace Freed

From: Amy Brunsting [at.home3@yahoo.com]
Sent: Tuesday, March 06, 2012 11:24 AM
To: Candace Freed
Subject: Signed Promissory Note
Attachments: File0001.bmp; File0002.bmp

Hi Candace,
I've attached a copy of the signed promissory note.

Amy

PROMISSORY NOTE

\$22,000.00

Feb. 29, 2012
(Houston, Texas)

On demand, we, ANITA KAY BRUNSTING and AMY RUTH BRUNSTING, Co-Trustees of the NELVA E. BRUNSTING SURVIVOR'S TRUST dated April 1, 2009, promise to pay to ANITA KAY BRUNSTING and AMY RUTH BRUNSTING, Co-Trustees of the ELMER H. BRUNSTING DECEDENT'S TRUST dated April 1, 2009, the sum of TWENTY TWO THOUSAND DOLLARS AND 00/100 (\$22,000.00) loaned to the said NELVA E. BRUNSTING SURVIVOR'S TRUST with interest, at the rate of nineteen one-hundredths percent (.19%) per annum, payable not later than one year from the date above as follows:

Place of Payment

1. All payments are to be made at 203 Bloomingdale Circle, Victoria, Texas 77904.

Prepayment

2. This Note may be prepaid in part or in full at any time without penalty.

Acceleration

3. It is understood and agreed that time is of the essence of this Note and that on default in the payment of any installment of principal or interest, or any part of principal or interest, when due, the holder of this Note, at the holder's election, may accelerate the unpaid balance of the principal and all accrued interest due and declare the balance due and payable immediately without presentment or demand for payment of any past-due installment of principal or interest or of any remaining unpaid balance of principal or interest, and without notice of intent to accelerate the payment of the unpaid balance of the principal or all accrued interest due on any parties to this instrument. If any Maker, endorser, or guarantor or other surety of this Note becomes insolvent or commits an act of bankruptcy or if for any other cause the protection of the holder, in the sole discretion of the holder, so requires, all liabilities of the undersigned to the holder, including this Note, will, at the option of the holder, mature and become due and payable without demand, grace, notice, presentment for payment, notice of intent to accelerate, and notice of acceleration, all of which are waived by any and all parties to this Note. The failure of the holder to exercise the holder's option to accelerate the maturity of this Note will not constitute a waiver of the right to exercise the option to accelerate at any other time.

Costs of Collection

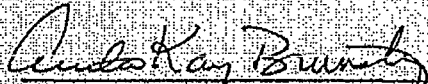
4. The Maker will pay on demand all costs of collection, legal expenses, and attorney's fees incurred or paid by the holder in collecting or enforcing this Note on default, not to exceed the sum of \$5,000.00.

Effect of Waiver

5. No delay or omission on the part of the holder in exercising any right under this Note will operate as a waiver of such right or of any other right under this Note. A waiver on any one occasion will not be construed as a bar to or waiver of any right or remedy on any future occasion.

Definitions

6. As used in this Note, the term "holder" means the payee or other indorsee of this Note who is in possession of it, or the bearer of this Note, if this Note is at the time payable to the bearer. The term "Maker" means the undersigned, unless such signer indicates on this instrument that it is signed in the capacity of an accommodation party. If this Note is signed by more than one person in the capacity of Maker, it shall be the joint and several liabilities of these persons.



ANITA KAY BRUNSTING, Co-Trustee of the
NELVA E. BRUNSTING SURVIVOR'S TRUST
dated April 1, 2009



AMY RUTH BRUNSTING, Co-Trustee of the
NELVA E. BRUNSTING SURVIVOR'S TRUST
dated April 1, 2009

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Wednesday, March 14, 2012 3:05 PM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: promissory note to decedents trust

Candace,

The survivors trust ended up borrowing \$20,000 from the decedents trust, but I transferred that amount back to the decedent's trust today - so all is paid back.

Anita

107 JARDON

Trust Expenses

Date	Vendor	Purpose	Amount
11/12/2011	Kroger - Houston	Groceries when cleaning/packing house	\$ 23.31
11/16/2011	Phillips 66 - Houston	Transportation	\$ 56.20
11/22/2011	Phillips 66 - Houston	Transportation	\$ 49.08
12/11/2011	Vacek	Legal	\$ 4,500.00
12/11/2011	US Treasury	tax payment for Decedent Trust	\$ 1,780.00
12/12/2011	Wilchester West Fund	subdivision dues	\$ 359.00
12/18/2011	Mr. Pham Chen	Lawn care - 2 mos	\$ 200.00
12/18/2011	Centerpoint Energy	natl gas for house	\$ 54.62
12/18/2011	Kelsey-Seybold	mom's medical	\$ 13.92
12/18/2011	Memorial Hermann	mom's medical	\$ 226.40
12/18/2011	ACS Primary Care	mom's medical	\$ 6.87
12/21/2011	USPS	Trust Docs	\$ 1.28
12/26/2011	Home Depot	Home Repair/Security	\$ 92.56
12/26/2011	Exxon - Victoria	Transportation	\$ 45.15
12/28/2011	Kroger - Houston	Groceries when cleaning/packing house	\$ 16.31
12/28/2011	HEB - Houston	Groceries when cleaning/packing house	\$ 3.50
12/28/2011	Ace Hardware	Supplies to pack up house	\$ 66.53
12/28/2011	Herb Jamison	house appraisal	\$ 450.00
12/29/2011	Shell - Victoria	Transportation	\$ 44.51
12/29/2011	Amy Brunsting	tires for mom's car/house repairs/transportation	\$ 425.94
1/9/2012	Exxon - Victoria	Transportation	\$ 49.57
1/10/2012	Dr. Annie Uralil	mom's medical	\$ 44.06
1/16/2012	Northwoods Urology Associates	mom's medical	\$ 740.77
1/17/2012	Don Summers Tax Asses/Collect	2011 property tax for mom's house	\$ 1,285.05
1/20/2012	Stream Energy	electricity for mom's house	\$ 59.96
1/31/2012	ATT	phone/internet for mom's house	\$ 86.00
2/2/2012	Visa	Credit Card Payment for moving supplies, meals and gas (unhide rows to s	\$ 269.84
2/11/2012	Memorial Hermann	mom's medical	\$ 41.72
2/14/2012	ATT	phone/internet for mom's house	\$ 72.16
2/17/2012	Stream Energy	electricity for mom's house	\$ 19.10
2/29/2012	Durapier	deposit to level mom's house	\$ 500.00
3/2/2012	Amy Brunsting	moving expenses on mom's house	\$ 844.35
3/6/2012	Carole Brunsting	reimbursement for paying Durapier & paying Tino \$780 to oversee project (\$ 25,655.00
3/11/2012	Kroese & Kroese	appraisal of farm and consult w/ Iowa atty	\$ 2,175.00
3/15/2012	Centerpoint Energy	natl gas for house	\$ 158.09
	Total		\$40,415.85

Liabilities

- Farm Taxes
- Property tax on house
- Remaining medical bills
- Insurance on car
- Decedent & Survivor Trust tax prep
- Trustee Expenses

NELVA BRUNSTING SURVIVOR'S TRUST ASSET LIST

OWNER	ASSET CATEGORY	DEC 2011 VALUES
	REAL PROPERTY	
	HS-Lt 31 Blk 4 Wilchester West Sec 1, 13630 Pinerock Ln., Houston, Harris County, Texas (value on tax role)	\$ 270,000.00
	SUBTOTAL	\$ 270,000.00
	INVESTMENT ACCOUNTS	
	Edward Jones Acct: #653-13555-1-6	\$ 191,205.00
	SUBTOTAL	\$ 191,205.00
	DRIP ACCOUNTS	
	Chevron Acct# 124921356678; 706.0888 shares @ \$106.78/share; tranferred to Anita Brunsting Trustee, 3/25/11	\$ 75,396.16
	Deere & Co. Acct#806578316055 - as of 2/1/2011; 9.5807 shares @ \$92.96/share; never transferred to my name as trustee	\$ 890.62
	ExxonMobil Acct#C0009467777, Shares 2101.968469 @ \$82.73/share; value as of 3/24/11 when transferred to Anita Brunsting Trustee.	173,895.85
	MetLife Acct#124921356678, Share 95.00 @ \$45.05/share	\$ 4,279.75
	SUBTOTAL	\$ 254,462.38
	CASH ACCOUNTS	
	Bank of America Ckg acct#0085190001143	\$ 5,215.37
	Blue Bonnet Credit Union Sav? Acct#13332	\$ 10.91
	Bank of America Ckg acct#586021229546 (joint acct w/ Carole set up to pay bills for and by Nelva Brunsting, value at start date 12/31/10	\$ 25.00
	SUBTOTAL	\$ 5,251.28
	NOTES RECEIVABLE	
	Anita Brunsting, 160 Exxon Shares already removed from total shares above	\$ -
	Anita Brunsting, 135 Chevron Shares already removed from total shares above	\$ -
	SUBTOTAL	\$ -
	MISCELLANEOUS	
	Household and Personal Goods	\$ 5,000.00
	Jewelry	\$ 853.00
	Coins	\$ 690.00
	2002 Buick LeSabre, VIN# 1G4HR54K3YU229418	\$ 5,500.00
	SUBTOTAL	\$ 12,043.00

	IRA/401K	
	Edward Jones, Acct# 609-91956-1-9, as of 1/1/2011	\$ 54,367.51
	TOTAL	\$ 787,329.17

MARCH 2012 VALUES	MARCH 2012 COMMENTS
\$ 433,129.32	SALE PRICE - CLOSING DATE 3/12/11
\$ 433,129.32	
\$ 1.05	
\$ 1.05	
\$19,012.88	172.4055 Shares @ \$ 110.28/share; value as of 3/16/2012
\$ 719.40	9.7125 Shares @ \$74.07/share; value as of 11/2/2011
\$ 72,256.12	835.910671 Shares @ \$86.44/share; value as of 3/16/2012
\$ 3,685.05	95.00 Shares @ \$38.79/share, value as of 3/19/2012
\$95,673.45	
\$ 1,471.75	3/19/2012
\$ 10.91	
\$ -	
\$ 1,482.66	
\$ 13,830.40	160 Shares @ \$86.44/share, value as of 3/16/2012
\$ 14,887.80	135 Shares @ \$110.28/share, value as of 3/16/2012
\$ 28,718.20	
\$ -	
\$ 853.00	
\$ 690.00	
\$ 5,500.00	title never transferred to trust
\$ 7,043.00	

\$	199.20
\$	566,246.88

Summer Peoples

From: Summer Peoples
Sent: 03/20/2012 5:22 PM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Cc: Chip Mathews Gmail
Subject: FW: Brunsting Estate
Sensitivity: Confidential

Attachments: Ltr to Bayless 3.20.12.pdf; Will - Nelva.pdf; Will - Elmer.pdf

For your information, a copy of the e-mail sent to Ms. Bayless is attached below.

Summer

From: Summer Peoples
Sent: 03/20/2012 5:21 PM
To: 'bayless@baylessstokes.com'
Cc: Chip Mathews Gmail
Subject: Brunsting Estate
Sensitivity: Confidential

Ms. Bayless:

Attached is a copy of the letter addressed to you from Mrs. Freed along with copies of the signed Wills for both Elmer and Nelva Brunsting. Originals are following via regular post mail. These copies are provided to you in advance for your convenience.

Thanks,

Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Telephone: 281.531.5800
Toll Free: 1.800.229.3002
Facsimile: 281.531.5885
E-mail: summer@vacek.com

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V&F 002149

03/20/2012

Summer Peoples

From: Summer Peoples
Sent: 03/20/2012 8:11 AM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Subject: Brunsting Estate - Invoice attached
Attachments: Invoice 3.20.12.pdf

Dear Co-Trustees:

Attached is the most recent statement for this matter. You currently have a balance in your account with us.

Thanks,

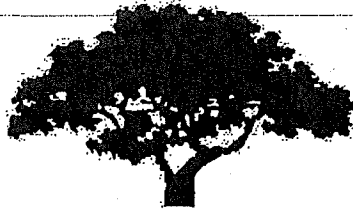
Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Telephone: 281.531.5800
Toll Free: 1.800.229.3002
Facsimile: 281.531.5885
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VACEK & FREED, PLLC

11777 Katy Freeway, Suite 300
Houston, TX 77079
(281) 531-5800
1-800-229-3002

Estate of Nelva E. Brunsting
c/o Anita Brunsting & Amy Brunsting, Co-Trustees
203 Bloomingdale Circle
Victoria, TX 77904

03/20/2012

Invoice # 10583

STATEMENT

Previous balance (\$2,219.53)

Professional Services

- 02/15/12 Draft letter to Client regarding recorded Deed; e-mail same to Client Summer Peoples
02/27/12 Correspondence via e-mail with Co-Trustee regarding Iowa rent and questions from CPA Candace Freed
02/28/12 File review; e-mail Co-Trustees regarding same Candace Freed
02/29/12 Correspondence via e-mail with Co-Trustees regarding loan agreement Candace Freed
03/05/12 Telephone conference with Co-Trustee Amy Brunsting and litigation counsel to discuss options related to same Candace Freed
03/07/12 Correspondence via e-mail with Co-Trustee regarding ILIT funds and setting up an account Candace Freed
03/12/12 Update asset list with information received. Leticia Meador
02/15/12 Postage to mail Deed to Client Summer Peoples
County Clerk Filing Fees for Deed recording Summer Peoples
02/27/12 Promissory Note Summer Peoples
03/05/12 Service Fee for teleconference meeting Summer Peoples
03/12/12 Copies of Order of Dismissal for file Summer Peoples
Email received from Co-Trustee Leticia Meador

Total for professional services rendered 2.85 \$801.04

Credit balance (\$1,418.49)

Billing Summary

Table with 2 columns: Description, Amount. Rows include Total for services rendered (\$608.50), Total expenses (\$192.54), Total payments and other transactions (\$0.00), Total previous balance (\$2,219.53).

Balance Due Now (\$1,418.49)

*Note: If Balance Due Now is shown above in parentheses, then amount shown is balance currently in your retainer account.

PAYMENT IS DUE UPON RECEIPT

PLEASE MAKE CHECK PAYABLE TO VACEK & FREED, PLLC

V&F 002151

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Thursday, March 22, 2012 11:35 PM
To: Candace Freed; Chip Mathews Gmail
Cc: 'Amy Brunsting'
Subject: Anita's accting at Dec 2011 and current.xlsx
Attachments: Anita's accting at Dec 2011 and current.xlsx

As we discussed, please find my accounting for Dec 2011 (or thereabouts, depending on when my name as trustee was put on certain investment accts - dates noted in spread sheet) and March 2012 (or thereabouts, date differences noted in spreadsheet).

Candace, I saw on your DOD accting, on Dad's side, questions about the amount of Chevron stock - he actually had 2 chunks of it, the amount of 604.9641 shares was on reinvestment and the dividends from the 612 shares was sent to mom, we got a couple of dividend checks since mom's death that I deposited into the decedents checking acct, but I have since put those shares on reinvestment as well - you'll see both listings in my spreadsheet - they're accessed under the same acct# (I listed the 612 shares under the acct key just to delineate them).

Thanks, Anita

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Thursday, March 22, 2012 11:45 PM
To: Candace Freed
Subject: your DOD acting questions

Looking over your other questions (highlighted stuff) on the DOD acting you sent: Under Bluebonnet credit union, I think the Acct#5805 was the acct for mom's credit card b/c I don't have anything w/ that # on it - just the statements for the Acct#13332 - It looks like mom had the savings acct and the credit card under her name only (no trust names on it).

Candy's note went under the decedents trust - I have no idea as to any interest rates on it.

Anita

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Tuesday, March 27, 2012 8:28 PM
To: Chip Mathews Gmail; 'Amy Brunsting'
Cc: Candace Freed
Subject: RE: Accounting

I became trustee on 12/21/2010 and the last four digits of the BofA acct are 1143 -

I reformatted the BofA ledger and the Gift Report in a legal/landscape format for printing and sent those to you in separate emails - if you'd like me to reformat any other files, please let me know.

Thanks, Anita

From: Bernard Mathews [mailto:texlawyer@gmail.com]
Sent: Tuesday, March 27, 2012 5:11 PM
To: Anita Brunsting; Amy Brunsting
Cc: Candace Freed
Subject: Accounting

Attached is a preliminary draft of the accounting I think we should provide. I will use the schedules forwarded by Anita (assuming I can figure out how to print them in a readable format).

Anita, I may have some additional comments, but on the BofA ledger, please eliminate the column that says "Mom's Checking" since there are no other accounts mentioned.

Candace can you scan and forward the final AE for the date of death?

I need the last four digits for the BofA account, and the date you began acting for your mother.

Upon forwarding the spreadsheets I will invite the beneficiaries or their representatives to schedule a time to review the supporting documents, and seek to have them coordinate on a date.

--
Bernard Lilse Mathews, III
Attorney at Law
Green & Mathews, LLP
14550 Torrey Chase Blvd., Suite 245
Houston, Texas 77014

(281) 580-8100
(281) 580-8104 (fax)

e-mail: texlawyer@gmail.com

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Candace Freed

To: Anita Brunsting
Cc: Amy Brunsting; Chip Mathews Gmail
Subject: RE: Final Asset list as of Nelva Brunsting date of death

IF assets were not in the trust or the estate on the date of death then they do not go on the asset list. Since they were gifted before she died then they should not be on the asset list for date of death. If they were to go against your inheritance (like Candy's) then I need to list them and zero them out.

All assets should appear on the date of death valuation list. Thus the bank of America and the car should be on the DOD report. It's a snapshot in time of all assets where ever they were located at the date of death. If there are any other accounts, checks, or anything that was in mom or dads name as well as the trust name, they should be listed.

I will change the farm information to correct the acreage and the Bank of America value since I have the stmt now. Let me know exactly the number of shares of each stock that were gifted prior to your moms passing that are to be attributed to your share of the inheritance and which trust they came from (presumably the Decedent's Trust?). If they were outright distributions not to be against your inheritance then they are not listed. Same is true Carol or anyone elses early distribution. The only documented early distribution to be counted against the inheritance is the acknowledged and signed letter by Nelva and Candy.

We need to get this finalized asap for Mr. Mathews so that it can be disseminated to the beneficiaries.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

The Law Firm of Vacek & Freed, PLLC has moved to our new location. Our new address is 11777 Katy Freeway, Suite 300 South, Houston 77079. We are conveniently located off the feeder of I-10, between Dairy Ashford and Kirkwood exits. We look forward to having you stop by!

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V&F 002156

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From: Anita Brunsting [mailto:akbrunsting@suddenlink.net]
Sent: Wednesday, March 28, 2012 9:11 PM
To: Candace Freed; 'Amy Brunsting'
Cc: Chip Mathews Gmail
Subject: RE: Final Asset list as of Nelva Brunsting date of death

How are the shares of Exxon and Chevron that I took against my inheritance reported on the DOD?

You have the total value of the farm correct, but it was valued at \$15,300/acre not \$13,500

Since the car was never titled to the trust, should it be listed?

Anita

From: Candace Freed [mailto:candace@vacek.com]
Sent: Wednesday, March 28, 2012 4:25 PM
To: Anita Brunsting; Amy Brunsting
Cc: Bernard Mathews
Subject: Final Asset list as of Nelva Brunsting date of death

Anita and Amy,

Please review the attached. Please review carefully the shares of stock and ensure that I have accurately reflected what was there on the November 11, 2011 date. This is a snap shot in time for the date. After reviewed please print and sign (counterparts are ok) and return each to me the signed one to my office.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

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Candace Freed

From: Candace Freed
Sent: Wednesday, March 28, 2012 4:25 PM
To: 'Anita Brunsting'; 'Amy Brunsting'
Cc: 'Bernard Mathews'
Subject: Final Asset list as of Nelva Brunsting date of death
Attachments: Asset List.pdf

Anita and Amy,

Please review the attached. Please review carefully the shares of stock and ensure that I have accurately reflected what was there on the November 11, 2011 date. This is a snap shot in time for the date. After reviewed please print and sign (counterparts are ok) and return each to me the signed one to my office.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
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V&F 002159

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Thursday, March 29, 2012 8:14 PM
To: Candace Freed
Subject: Info on exxon and chevron shares
Attachments: Brunsting Family Trust Assets and Expenses.xls

From: Anita Brunsting [mailto:akbrunsting@suddenlink.net]
Sent: Saturday, March 17, 2012 8:43 PM
To: 'Candace Freed'
Subject: 3-16-12 Trust accting update

Candace,

I think I made an error on how I reported the list of stocks to the beneficiaries. Mom wanted to pay for Luke's first year in college which was going run about \$26,000. To save on taxes to the trust, I transferred that amount to my name in the form of Exxon and Chevron stock, and took it against my inheritance. I reported what shares of stock were remaining in the trust, but I realize that I should probably add the shares I took out back in, then when we distribute them, we divide it by 5 and then I take what I took against my inheritance out of my portion and only take the remainder. So I'm including an updated report that shows the shares I took out - 160 Exxon shares and 135 Chevron, both from the Survivors trust (lines 5 & 8), and I kept them separate in the formula, so we can easily update any future shares purchased from reinvestment.

Anita

Brunsting Family Survivor's and Decedent's Assets

Asset	# shares	price/share *	Amount*
Chevron/Texaco-decedent	614.1303	110.28	\$67,726.29
Chevron/Texaco-survivor	172.4055	110.28	\$19,012.88
Chevron - Decedent	612	110.28	\$67,491.36
ExxonMobil-Decedent	583	86.44	\$50,394.52
ExxonMobil-survivor	835.910671	86.44	\$72,256.12
MetLife - Survivor	95	38.38	\$3,646.10
Survivor's Trust Edward Jones			\$1.05
Decedent's Trust Edward Jones			\$251,627.40
Survivor's Trust Checking			\$448,524.34
Decedent's Trust Checking			\$41,667.77
Misc. Coins			\$690.00
Gold Watches/misc jewelry			\$853.00
Total Liquid Assets			\$1,023,890.83
Farm (acres)	141	15300	\$2,157,300.00
House			
Total Trust			\$3,181,190.83

*values as of 3/16/2012

Includes deposit of \$433,129.32 from sale of
Includes deposit of first 1/2 of farm rent for
2012: \$26437.50 and Chevron Dividend:

appraised value/acre
final sale profit \$433,129.32 - reflected in
balance in survivors trust checking acct

Summer Peoples

From: Summer Peoples
Sent: 03/29/2012 10:10 AM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Subject: Brunsting Estate - Invoice
Sensitivity: Confidential
Attachments: Invoice 3.29.12.pdf

Dear Brunsting Co-Trustees:

Attached is the most recent invoice for this matter. The statement shows the balance currently in your account with us.

Thanks,

Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
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E-mail: summer@vacek.com

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VACEK & FREED, PLLC

11777 Katy Freeway, Suite 300
Houston, TX 77079
(281) 531-5800
1-800-229-3002

Estate of Nelva E. Brunsting
c/o Anita Brunsting & Amy Brunsting, Co-Trustees
203 Bloomingdale Circle
Victoria, TX 77904

03/29/2012

Invoice # 10596

STATEMENT

Previous balance			(\$1,418.49)
	Professional Services		
03/19/12	Update Asset List with information received		Leticia Meador
	Phone call with Client regarding accounting and related issues		Candace Freed
03/20/12	Correspondence via e-mail with Client regarding advance of Trust share		Candace Freed
	Letter to Clerk regarding filing Wills for safe-keeping; e-mail letter to attorney Bobbie Bayless and copy to Co-Trustees		Summer Peoples
03/22/12	Correspondence via e-mail with Bayless to advise that Wills were filed with Clerk		Summer Peoples
03/19/12	E-mail received from Co-Trustee		Leticia Meador
03/20/12	Service Fee for Federal Express delivery to Clerk to file Wills		Summer Peoples
	Copies of Wills		Summer Peoples
	County Clerk Filing Fees for filing Wills for safe-keeping		Summer Peoples
	Postage to mail letter and copies of Wills to Bayless		Summer Peoples
Total for professional services rendered		2.40	\$469.90
Credit balance			(\$948.59)

Billing Summary

Total for services rendered	\$424.00
Total expenses	\$45.90
Total payments and other transactions	\$0.00
Total previous balance	(\$1,418.49)

Balance Due Now: (\$948.59)

**Note: If Balance Due Now is shown above in parentheses, then amount shown is balance currently in your retainer account.*

PAYMENT IS DUE UPON RECEIPT

**PLEASE MAKE CHECK PAYABLE TO
VACEK & FREED, PLLC**

V&F 002163

Thank you!

Candace Freed

From: Candace Freed
Sent: Friday, March 30, 2012 8:45 AM
To: 'Anita Brunsting'
Cc: 'Amy Brunsting'; 'Bernard Mathews'
Subject: RE: Boank of America Account stmt for november 2011
Attachments: Asset List final for acctg.pdf

Here is the updated list with Carole and Moms account to the date of death based on the stmt sent last night. Please review, print sign and return. You can fax it or email the signed one. No need to send me an original at this point. We can get it from you when there is something else to send.

Warmest Regards,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

The Law Firm of Vacek & Freed, PLLC has moved to our new location. Our new address is 11777 Katy Freeway, Suite 300 South, Houston 77079. We are conveniently located off the feeder of I-10, between Dairy Ashford and Kirkwood exits. We look forward to having you stop by!

IRS CIRCULAR 230 DISCLOSURE: Tax advice contained in this communication (including any attachments) is neither intended nor written to be used, and cannot be used, to avoid penalties under the Internal Revenue Code or to promote, market or recommend to anyone a transaction or matter addressed in this communication.

This e-mail is covered by the Electronic Communications Privacy Act, 18 U.S.C. 2510-2521 and is legally privileged.

This information is confidential information and is intended only for the use of the individual or entity named above. If the reader of this message is not the intended recipient, or the employee or agent responsible for delivering this electronic message to the intended recipient, you are notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this transmission in error, please notify us immediately by reply e-mail or by telephone (800-229-3002), and destroy the original transmission and its attachments without reading them or saving them to disk or otherwise. Thank you.

From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Thursday, March 29, 2012 9:23 PM
To: Candace Freed
Subject: RE: Boank of America Account stmt for november 2011

Here you go, my scanner will only do one page at at time.

From: Candace Freed [<mailto:candace@vacek.com>]
Sent: Thursday, March 29, 2012 9:14 AM
To: Anita Brunsting
Cc: Amy Brunsting; Bernard Mathews
Subject: RE: Boank of America Account stmt for november 2011

Anita,

I have this statement – I need the one that was in your moms name and Carol's name and was closed out by Carol. Not the trust one. Thanks

Candace

From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Wednesday, March 28, 2012 8:04 PM
To: Candace Freed
Subject: RE: Boank of America Account stmt for november 2011

From: Candace Freed [<mailto:candace@vacek.com>]
Sent: Wednesday, March 28, 2012 12:40 PM
To: Anita Brunsting; Amy Brunsting
Cc: Bernard Mathews
Subject: Boank of America Account stmt for november 2011

Please send me a copy of the stmt for the file. I used the account value and number you gave me over the phone.
Thanks

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
E-mail: candace@vacek.com
www.vacek.com

The Law Firm of Vacek & Freed, PLLC has moved to our new location. Our new address is 11777 Katy Freeway, Suite 300 South, Houston 77079. We are conveniently located off the feeder of I-10, between Dairy Ashford and Kirkwood exits. We look forward to having you stop by!

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V&F 002165

Code or to promote, market or recommend to anyone a transaction or matter addressed in this communication.

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Summer Peoples

From: Summer Peoples
Sent: 04/12/2012 10:21 AM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Subject: Brunsting Estate
Sensitivity: Confidential
Attachments: Invoice 4.12.12.pdf

Dear Brunsting Co-Trustees:

Attached is a copy of the most recent invoice. There is currently a balance in your account with us. The invoice is attached for your information only.

Thanks,

Summer Peoples, CP
Certified Paralegal

Vacek & Freed, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079
Telephone: 281.531.5800
Toll Free: 1.800.229.3002
Facsimile: 281.531.5885
E-mail: summer@vacek.com

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Notes/History

Candace Freed

11777 Katy Freeway, Suite 300 South
Houston, TX 77079

Date Range - All Dates

Contact Elmer H. Brunsting Elmer H. Brunsting

Histories

<u>Date</u>	<u>Time</u>	<u>Result</u>	<u>Regarding & Details</u>	<u>Record Manager</u>
3/20/2012	1:50 AM	Call Completed	Email from Anita brunsting advising abt Conversation related to Trust accounting Emailed response advising of sttus of the car and need for heirs to sign since its a non trust asset. Otherwise it becomes a probate asset	Candace Freed
3/6/2012	12:24 PM	Call Completed	Phone call from Litiqation Counsel reuested verification of continuing to set up het personal asset trusts. answer was yes, may want to hold off on Candy's since she has filed suit - there appears to be no problem with the trusts themselves just who will be in charge of it. Discussed with CHIP the issues relating to SMJ that the court felt took it out of his realm. Handlign Lis pendens action first and handle the rest later. Dismissal perhaps. Advised him that Checks in the mail from the client. He has not stopped workin gon it. C	Candace Freed
3/6/2012	12:21 PM	Call Completed	Phone call from Anita Brunsting re: Doug Edwards She wanted to verify that I had in fact called Doug Edwards for accoutn info. Yes, it was me - ALso advised her that best to go ahead (via email) to send the \$5000 retainer from her money and that the trust could reimburse her later for it when it was complete. This would keep it clean - This after I spoke with Chip. CLF	Candace Freed
3/6/2012	12:20 PM	Engage ltr mailed/emailed	Copy of Promissory Note from the DT to the ST rec'd and signed by both Co-tees. CLF	Candace Freed
3/5/2012	9:00 AM	Meeting Held	5/1(f) appt 1.00 teleconference call with Counsel an Co-tees related to the Litigation pending and lis pendens Filing. Co_trustee Anita B. was not present on the phone call. Co-Tee Amy Brunsting was available for teleconference. Discussed optiosn relating to same and how to proceed to ensure that sale of the HS that already had a contract on the home.	Candace Freed
3/2/2012	6:16 PM	To-do Done	1.0 Review of Complaint filed int he Fed District Court. CLF	Candace Freed



Notes/History

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

Date Range - All Dates

1/6/2012	11:02 AM	To-do Done	I mailed the subtrust deed to Harris County Clerk for recording. bms	Beth Spiller
12/29/2011	5:08 PM	Call Completed	rtn call to Anita Brunsting Re: Candy made up with Drina at the funeral and now she beleives that they all misunderstood the situation and where Drina was coming from.	Candace Freed

Had a formal Appraisal Done Between \$400-500K she thinks on the house. They are about to put it on the market.

Having the home cleaned out.

Realtor would like to see the square footage and the aappraisal distruict had it incorrect before listing it.

Land re: In Iowa. in the DT. Accountant in Iowa - Rich says its no big deal to set up an LLC or something with a first right of refusal clause in it for at Fair Market Value Right of First of refusal. The trustee would have to sign on behalf of each trust.

Appraisal at a per acre should be had so that if anyone buys anyone else out they know their cap gains and its fair market value. Candy and Amy may want cash. I suggested having Rich send all beens a document advising of the cap gains issue. As I recall there may have been an issue in IOWA with an IRREV trust owning farmland.

Need to send the ss4's to the trustees Amy and Anita and have them sign them for the 5 trusts to be set up to transfer property to. the life insurance paperwoek is being submitted and not come in yet. Not sure if there is enough liquidity for each person to be bought out of the farmland in IOWA. I recommended any deviation from prorata distribution to be done by them shoudl be in a family settlement agreement.

She asked whether she could be sued for mental anguisgh by Drina in a civil suit. I l s suppose but sounds like a stretch or scare tactic.

All benes have been provided a copy of the trust document and it was sent certified mail to each bene.



Notes/History

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

Date Range - All Dates

11/22/2011

10:00 AM

Meeting Held

Candace Freed



Notes/History

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

Date Range - All Dates

5/1 appt
11/22/2011 Meeting 2.0 hours with Co Trustees Amy
Brunsting and Anita Brunsting.

Discussed the status of Ms. B's share of the estate. Some assets were sold off (liquidated) to pay for her care. The Land is still in the Decedent's Trust and still produced income for Ms. B.

Had the Co-Tees sign ss4's and tax Id for ST was obtained. COT for DT and ST were sent with them after signing and notarizing. They also signed a delegation of authority for the Bank of America Acct so that Anita could sign checks alone.

Advised them of the requirements of Trustee in writing. Also advised that they needed to set up an accounting. Be able to provide a status of the estate at any given time. Offered to provide a meeting with all present beneficiaries if desired. However, reminded them that representation is for them and them alone and I cannot speak with nor can I give legal advice to any beneficiary. They would be required to sign something to that effect before the meeting.

Sent them with to do list. HIPAA was signed by both parties. Amy took the Binder set of the documents and Anita took the blue-backed documents. They provided some asset information.

They both seem very interested in carrying out mom and dad's wishes and follow the terms of the trust.

Prepared COT(s) for DT and ST and gave EIN for ST with HIPAA to them so that they can take care of the accounts that are in ST name.

Eventually the PAT trusts will be set up. Prepare AE for ST and DT. They will advise if Family Settlement agreement is needed relating to the land.

There is an ILIT that can be cashed out now (unless there is liquidity needed to pay any taxes); None are foreseen. CLF suggests appraisal on the far if there is a disproportionate share being provided to ensure that fair market value is known and the cost basis is also known.



Notes/History

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

Date Range - All Dates

11/14/2011	9:41 AM	Field Changed	Field changed Field E-mail List changed from "True" to "False"	Candace Freed
11/14/2011	9:41 AM	Field Changed	Field changed Field ID/Status changed from "Client" to "CLOSED"	Candace Freed
11/14/2011	9:41 AM	Call Completed	Email from Anita Brunsting dtd 11/13/2011 that Nelva Brunsting Died 11/11/11 Emailed condolences and told her to contact us if they need to meet when everyone is in town. CLF	Candace Freed
9/28/2011	9:29 AM	Call Completed	Email from Anita re: Refund due and request from IRS for the form for POA And certification. Told her to contact CPA for the form. He will have it. CLF	Candace Freed
9/20/2011	5:12 PM	Invoice mailed	IOLTA Mailed IOLTA Invoice to Client. Balance in acct: \$444.76. skp	Summer Peoples
9/6/2011	3:49 PM	Email rec'd	Email from Mr. Blackburn re: trustee documents and amendments; emailed Anita Brunsting	Candace Freed
8/29/2011	4:37 PM	Completed	Retainer Fee Rec'd \$1,000 retainer fee as req in engage ltr. We are now engaged for this matter. skp	Summer Peoples
8/18/2011	4:40 PM	Completed	Copies of LT Sent copies of LT to Anita Brunsting for her rev'w. Incl SASE to Jim Blackburn's office for Anita to fwd copies to him. Added cost of this to TS. skp	Summer Peoples
8/16/2011	10:02 AM	Engage ltr rec'd	No retainer fee enclosed Rec'd signed VF copy of engage ltr fm Anita Brunsting. No retainer fee was incl. We are still not engaged for this matter. CLF will EM Anita to advise that retainer fee is required and that we are currently not yet engaged for this matter until we rec'v retainer fee. skp	Summer Peoples
8/12/2011	9:34 AM	Call Received	Dale with Law Office of Jim Blackburn 713-524-1012 She is waiting for docs. I called CLF and she said to tell her that and e-mail was sent this morning to her boss to check with him. He has all the info.	Merlin Case



Notes/History

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

Date Range - All Dates

8/9/2011	4:09 PM	Call Completed	I called Anita Brunsting to see if Carol Brunsting was still going to come by the office to rev'w the docs prior to mail out. No, she wants docs mailed to her. She will look them over and give us her approval. It will be a couple of wks. Tell Jim Blackburn's office that we all have something better to do and it will be a couple of wks. She said that once she has rev'd the docs, then she will give us the go-ahead to mail another set to Blackburn's office. I advised CLF of my conversation w/ Anita. CLF asked why I didn't call Carol directly. I misunderstood, for I thought I had to talk w/ Anita as Tee. CLF said she would talk w/ Anita & contact Blackburn's office. I reminded CLF that we have not yet been engaged for this matter and are still awaiting the requested retainer fee. EM CLF. skp	Summer Peoples
8/9/2011	9:07 AM	Call Received	Dale of atty Jim Blackburn's office called (LVM on 8.5.11 @ 11:36am). She would like to send messenger to pick up info req by Jim. We can send bill along w/ pkg that messenger will pick up. Or mail bill, if preferred: 4709 Austin St., Houston, Texas 77004. Pls call Dale to make arrangements to confirm when messenger can pick up copies. 713-524-1012. EM CLF. skp	Summer Peoples
8/4/2011	9:26 AM	Call Left Message	LVM for Anita Brunsting to confirm that I have copied docs for Jim Blackburn and Carol Burnsting is welcome to come by to view the docs anytime today until 5:30pm or on Tues 8:30-5:30 (we are closed Friday and for just this Monday we are closed). skp	Summer Peoples
7/29/2011	9:25 AM	Call Completed	Emailed Jim Blackburn that My client is considering the request. CLF	Candace Freed
7/29/2011	9:24 AM	Call Completed	Calle to Anita Brunsting to recommned giving a copy of the trust and the amendments to the Atty for Carl. CLF She said she would consider it. I explained that when Nelva passes away he will have it anyway.	Candace Freed
7/28/2011	8:07 AM	Engage ltr mailed/mailed	\$1,000 retainer Mailed engage ltr to Anita Brunsting, Tee, for hourly services re to Carl Brunsting issue. Incl VF copy and return enve. skp	Summer Peoples
7/27/2011	5:20 PM	Call Received	Jim Blackburn, atty for Carl Brunsting, called for CLF (LVM @ 10:20am) re getting a copy of LT. Pls call. 713-524-1012. (I have added Jim's contact info as a Secondary Contact in Client ACT, since I suppose we will be contacting him a lot lately.) EM CLF. skp	Summer Peoples



Notes/History

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

Date Range - All Dates

7/25/2011

4:12 PM

Call Completed

Candace Freed



Notes/History

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

Date Range - All Dates

Telecon with Anita Brunsting

She talked to her Sisters and they came up together w/a counter offer of sorts: Lawyer and Carl can come in and discuss the terms of the trust but that she does not want to give them a copy of the trust and the amendments. She would like to meet with me first but she would like Carl to pay for it (my time to meet with them rather than moms trust).

I told her that only signed documents would be discussed. She did not want moms assets (i.e. the list that was prepared for dads estate) not to be disclosed.

She (Anita Brunsting) would prefer to meet with me ahead of time and to see what would be discussed and she would like that to be on their nickel too. I told her that is not going to happen. Anita says she or one of her sisters should be there in the room. She asked my opinion on this. I told her that if she thought it would be confrontation that is not a good idea. She said that she does NOT want this to be confrontational. She has not seen her brother in months and would like to see how he is doing and what his condition is. She is surprised that he is spearheading this and thinks its his wife. Her brother Carl the last time could not remember what he would say day to day what he is asked for. SIL has been extremely ugly to mother as well as all other sibs and she would also like to be present to see what her SIL is goign to try and bring up. She asked if the sister in law can come in without a POA. I told her that if Karl requests it then its irrelevant whether she has POA. She wonders if her brother could even sign such a document.

Q is who is lawyer the representing? If Karl, then just Carl and lawyer in the room although Karl may request his wife's presence.

Anita would like for her to show that she has power of attorney - told her that I do not repsent Karl and that it is a separate issue.

Summary: They would meet with us (conunter offer) explain to them verbally the terms of the trust and if they would like to see the trust sections that I am referring to, we would be happy to discuss but that would not like to provide them with a hard copy of the trust at this point. Anita advised that if the meeting could be in the next few weeks is best b.c of school starting. Her or another one of her sibs presence is fine.

V&F 002175



Notes/History

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

Date Range - All Dates

7/21/2011	4:26 PM	Call Received	Anita Brunsting called for CLF (LVM @ 2:23pm). Pls call. (See Secondary Contacts for Anita's ph#.) EM CLF. skp	Summer Peoples
7/19/2011	5:56 PM	Call Completed	Call from Jim Blackburn 713.524.1012 Requesting copy of the trust and the changes made as he represents Karl. I asked if he requested a copy fo the trust already (Client) and he said that no as they were represented by Counsel. He said if I give permission he would call whoever and ask. I told him that no I would contact my client. jbb@blackburncarter.com Called Client (Anita Brunsting as trustee) and she said that she was not surprised based on email that she got from her Sister In law. I explained the issue with giving or not givign it and that Karl will certainly be entitled to it on Nelva's passing. I dod not even remember the changes that were made. She reminded me that it was to put her and her sis in charge of Karls PAT and one change was to go into PAT because he was trying to recover from ensyf. She said she would call in a few days after she has thought about it and let me know. CLF	Candace Freed
6/7/2011	11:43 AM	Call Received	Anita Brunsting called for CLF. She just found accts that still show her mom as Tee and the companies are not giving Anita any info. She isn't sure what to do w/ them. I advised that she needs to provide a copy of the resignation docs to the companies that show she is Tee after her mom res'd. She will do that and see if that takes care of it. I told her to call back if she is still having issues. EM CLF. skp	Merlin Case
6/1/2011	8:05 AM	Field Changed	Field changed Field Last Results changed from "SECOND NOTICE INVOICE MAILED 5.2.11. skp" to ""	Summer Peoples
6/1/2011	8:05 AM	Invoice pymt rec'd	\$575.59 pymt Rec'd full pymt fm Anita Brunsting fm second notice of Invoice that was mailed to her a month ago. I just mailed out the third notice yesterday, so they crossed in the mail. The matter is now pd in full and can be closed again. EM CLF. skp	Summer Peoples
5/31/2011	12:10 PM	Invoice mailed	Third Notice Invoice Mailed Third Notice of pymt past due by 60 days to Anita Brunsting. Incl return enve for pymt. skp	Summer Peoples



Notes/History

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

Date Range - All Dates

5/2/2011	11:02 AM	Field Changed	Field changed Field Last Results changed from "See CLF for this Client. skp" to "SECOND NOTICE INVOICE MAILED 5.2.11. skp"	Summer Peoples
5/2/2011	11:00 AM	Invoice mailed	Second Notice (\$575.59 pymt due) Mailed Invoice to succ Tee Anita Brunsting for LT hourly work. Incl return enve for pymt. This is the second notice of pymt 30 days past due. skp	Summer Peoples
4/29/2011	2:51 PM	Call Completed	phone call to Anita Brunsting Explained the rationale for the DT being income driven out to mom and her need to be the beeneficiary duringher lifetime. Why income comes out. CLF	Candace Freed
4/28/2011	2:29 PM	Call Received	Anita Brunsting called for CLF (LVM @ 1:13pm). She has just finished the "first round of trust taxes." The financial advisor & investment broker have both asked why is LT set so that mom has to take dividend proceeds out? Per Anita, mom doesn't really need add'l income. Pls call or EM to advise why this is necessary or if it can be changed. (Anita's contact info - ph & EM - is in the Secondary Contacts in ACT.) EM CLF. skp	Summer Peoples
3/29/2011	11:08 AM	Invoice mailed	\$575.59 fees Mailed Invoice to Anita Brunsting, Tee, for hourly fees to-date. Incl return enve for pymt and new business cards along w/ a note that we've moved. skp	Summer Peoples
3/22/2011	1:18 PM	Letter sent	BNY Mellon Sent original funding ltr & completed transfer forms to BNY Mellon for Chevron Stock. Sent via FedEx for 3-day delivery (Client wants to save on fees). skp	Summer Peoples
3/22/2011	1:10 PM	Completed	Death Certificate Rec'd original death cert fm Anita Brunsting. skp	Summer Peoples
3/21/2011	7:14 AM	Email rec'd	Name Change Rec'd EM fm Amy Tschirhart Brunsting to show court papers that her name is now legally changed to Amy Brunsting. Printed copy of order for file. skp	Summer Peoples



Notes/History

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

Date Range - All Dates

3/17/2011 10:25 AM Email rec'd

Amy Ruth Tschirhart name change Summer Peoples
CLF replied to EM below to say that nothing needs to be done on our part. I have updated her name in ACT as needed. skp

From: Amy Tschirhart [mailto:at.home3@yahoo.com]

Sent: Wednesday, March 16, 2011 1:42 PM

To: Candace Freed

Subject: Name change

Hi Candace, I've changed my last name back to Brunsting and I wanted to know what documentation you needed to update the trust records. I can send you a pdf file of the date-stamped court orders, a regular copy of the orders, or a certified copy of the orders. Thanks, Amy

3/16/2011 12:05 PM Call Completed

t/c w/ Anita Brunsting re: brother Carl. sv Susan Vacek
Carl is in his 50s. He had encephalitis last yr and a struggling recovery. He is married, but his W is not taking care of him, according to Anita. He was hospitalized when they found out that he is so underweight - 120 lbs and 6'7" tall.
- W has been threatening to divorce him for the last 1.5 wks. She called the Houston sister to come and move him out because she is going to proceed w/ divorce.
- Carl is receiving disability - he can't make decisions, but has moments of clarity.
- they don't know if W has gotten him declared incompetent.
- Mom will have to pay for legal action
- Bro lived w/ Mom for 5 weeks w/in last year, when W had a "breakdown". Carl seemed to get better. they don't thing W is making sure he takes his meds.
- I told her a divorce atty would be able to find out if there has been any legal action taken re: incapacity.
- when Carl was living w/ Mom, W did come by and have Carl sign something, but they don't know what.
- issues w/ Med POA and Fin POA.
-referred her to Brett Bosker, 713-461-5288, per AEV recommendation. sv



Notes/History

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

Date Range - All Dates

3/16/2011	11:04 AM	Invoice pymt rec'd	\$340 pymt rec'd Rec'd full pymt for hourly fees thus far. skp	Summer Peoples
3/16/2011	10:55 AM	Completed	Exxon Mobil Sent completed medallion guaranteed forms and copies of DT & ST & resignation forms along w/ 1 original death cert to Computershare to trans Exxon Mobil stock. Sent via FedEx for 3-day delivery (Client wants to save on costs). Once the second original death cert is rec'd fm Client, I will send Chevron (BNY Mellon) docs via FedEx w/ copies. Currently the Chevron papers are in the fire-safe in the brown pendaflex file. skp	Summer Peoples
3/10/2011	2:41 PM	Call Completed	Returned call to Anita Brunsting to set signing appt for tmrw morning. Anita will bring in her mom Nelva to sign QBD. I advised of new office address and gave directions. 5/3(f) set for 11am for tomorrow morn. EM CLF. skp	Summer Peoples
3/10/2011	2:25 PM	Call Received	Anita Brunsting called for CLF (LVM @ 12:00pm). She called twice (once yesterday & once today) and left a note of "urgent" w/ answering svcs. She sent EM to CLF. They need to get the changes in effect as soon as possible to protect her bro. Is it possible to do this today or tomorrow? Her brother called her mom in the middle of the night to ask if he can live w/ his mom forever. The wife ripped the ph out of his hands and hung up. They are frightened for their bro's safety. There is a possibility that w/o it she can get to mom's money. She will be willing to drive into Houston today to get this signed or tomorrow. (Trans VM to CLF for her to hear msg - Anita was very upset w/ the situation and the non-response on our part; CLF is currently in a mtg, but I will see what I can do to sched appt). EM CLF. skp	Summer Peoples
3/2/2011	12:00 PM	Meeting Held	5/3(f) appt - QBD 3/11/2011 11: 25 am Met with Nelva Brunsting (grantor) and Trustee Anita Brunsting. AEV joined and after discussion with him he and I joined the client and addressed the concerns we have as the firm for her signing such a document that would cut out her sone and her granddaughter totally. After some Q and A it was recommended that Ms. B not sign the document that she asked us to prepare and why. PAT trust in place in the event that Ms. B passed on. The daugh 's are the trustees for Candy and Carl (Amy and Anita) with Frost Bank as a back up. CLF	Candace Freed



Notes/History

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

Date Range - All Dates

2/21/2011	4:36 PM	Call Completed	Returning call I called Carol Brunsting back to set appt. Set 5/3 (f) for 3.2.11. Advised appt time is for only 1 hr, as CLF has afternoon appts. This appt is just for Nelva to sign QBD, so it shouldn't take 1 hr. Carol will be coming w/ Nelva. I advised Carol of our current office address. EM-CLF. skp	Summer Peoples
2/21/2011	2:44 PM	Call Received	Carol Brunsting returned Summer's call. 713-560-6381 Em to SKP	Merlin Case
2/21/2011	1:47 PM	Call Left Message	LVM for Carol Brunsting. I called her per Anita Brunsting to sched appt for mom Nelva Brunsting to come in and sign QBD before CLF. Carol will call back to coordinate w/ me. skp	Summer Peoples
2/16/2011	9:51 AM	Letter sent	Fndg Ltrs Mailed Chevron & ExxonMobil DRIP fndg ltrs to Anita Brunsting for her to sign as Tee. Incl copies of subtr COTs & W-9s for DT & ST. Also incl forms that CLF completed for Anita's signature. All forms and docs are marked for Tee's signature. Copies of the forms are in the funding file. skp	Summer Peoples
2/14/2011	3:07 PM	Engage ltr rec'd	Rec'd signed engage ltr fm Anita Brunsting. Matter is hourly and no retainer fee was requested. skp	Summer Peoples
2/14/2011	2:23 PM	Invoice mailed	Invoice (\$340) mailed Mailed Invoice to Anita Brunsting along w/ return enve for pymt. skp	Summer Peoples



Notes/History

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

Date Range - All Dates

1/27/2011	4:04 PM	Call Completed	<p>Call from Nelva Brunsting requesting changes to her documents Nelva called me today and requested that Carl be removed in total from Elmer's share of the trust. She also requested that a provision be placed in her trust that if he predeceases her that his share will be divided among her children rather than Carl's children. She will need to sign the qualified Beneficiary designation as the Surviving Founder and you will sign as trustee after she signs.</p> <p>In my conversations previously with the trustee acting at this point, Ms. B is having a hard time with Carl and his soon to be ex-wife who are insisting that she sell the IOWA land in Elmers Decedent's Trust and give them their share. This has been a problem for the family since Carls hospitalization and continuing recovery from Ensephylitis.</p>	Candace Freed
1/27/2011	9:39 AM	Engage ltr mailed/mailed	Mailed engage ltr to Anita Brunsting for hourly work re her mom's LT (and related to her dad's PM?). Incl VF copy and return enve for same. skp	Summer Peoples
1/24/2011	5:08 PM	Invoice pymt rec'd	\$880.15 pymt rec'd Rec'd full pymt for Invoice mailed (Ck No. 7003). EM CLF. skp	Summer Peoples
1/6/2011	4:55 PM	Call Received	Anita Brunsting called for CLF (LVM on 1.5.11 @ 4:10pm) to follow up on EMs she sent. Pls call her (wk ph listed under Secondary Contacts in Nelva Brunsting's Client ACT record). EM CLF. skp	Summer Peoples
1/3/2011	1:24 PM	Call Completed	Email to Anita Brunsting Email to Anita as to what is needed to remedy the additional assets in the form of DRIP accounts. CL F	Candace Freed
1/3/2011	11:35 AM	Call Completed	1-800-252-1800 Computershare re: Exxon Transfer Request Forms - Investor center - Forms - have them mailed for the address on the account. The transfer request forms are being mailed. Computershare would nto send out the statment for free and needs Ms. B to call and ask for it and there is a 10.00 charge. CLF	Candace Freed



Notes/History

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

Date Range - All Dates

1/3/2011	11:21 AM	Call Completed	1-800-368-8357 Chevron Shareholder Services Mr and Mrs. B had Chevron stock certificated. 612 to be exact. Not sure what happened to the shares (whether reissued in certificated form or whether they were moved to Ed Jones or placed in DRIP). Chevron stock certificate was sent in and retitled in the name of the Elmer Brunsting Decedent's trust. CLF asked that they send the April 2009 statement for the Chevron Stock to Ms. B at her address so we have the number of DRIP shares that were owned on Mr. B's date of death. CLF	Candace Freed
1/3/2011	8:53 AM	Email rec'd	Email from Anita Brunsting (Acting trustee) Stating that she found additional assets that were not listed on TAB 4 of the funding book when her dad passed away. I responded via email to send them to me and let me take a look at it to see if there was anything that needed to be done.	Candace Freed
12/30/2010	5:16 PM	Call Completed	Rtn call to Anita B. Current Trustee She advised ther bro Carl was staying at her moms home and now is back in hospital. His wife hurt her back and could not take care of Carl at home. Moms caretakers were helping with him at her home. During that time Carl was notice to be too thin and Adult protective services was contacted by the hopsital when he was brought in for being to thin. She was concerned (very long story short) that her didter in law is holding out to get her hands on the money that Carl would get. What happens if he dies - does it go by his will. Answer: No. According to the QBD dtd August 25, 2010 it will go in trust for Carl and if deceased then to his child or children in trust with trustees till they are 35. Their mom cannot take it out for them. CLF	Candace Freed
12/30/2010	2:40 PM	Call Completed	I returned Anita Brunsting's call to see if I could help her w/ something. She said that it was rather complicated and re a "predeceased clause" for her bro. I didn't ask anymore and she didn't offer anymore. (I'm guessing that her bro has died and she wants to confirm distr of his share to see if it needs to be amended now.) I advised her that CLF is in a mtg w/ another client until 4pm or so. EM CLF. skp	Summer Peoples
12/30/2010	2:38 PM	Call Received	Anita Brunsting called for CLF (LVM @ 1:33pm). Pls call. 361-550-7132. skp	Summer Peoples



Notes/History

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

Date Range - All Dates

12/23/2010	8:28 AM	Invoice mailed	\$880.15 Invoice mailed Mailed Invoice to Anita Brunsting (Tee) for cost of resignation docs, etc. Incl return enve for pymt. skp	Summer Peoples
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12/22/2010	10:06 AM	Meeting Held	Nelva Brunsting res'd as Tee CLF met w/ Nelva & Anita Brunsting at Nelva's home yesterday. CLF notarized Nelva signing the resignation of LT & subtrs. Anita accepted service for same. Prior to resigning, Nelva signed a new Appt of Succ Tee to name Anita as Tee w/ Amy as succ Tee (prior to this, Anita & Amy were named as Co-Tees). skp	Summer Peoples
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11/29/2010	11:07 AM	Call Completed	Email from Anita Brunsting - response 11/29/2010 Emailed Client's Dau as follows: From: Candace Freed Sent: Monday, November 29, 2010 8:30 AM To: 'Anita Brunsting' Subject: RE: Nelva Brunsting	Candace Freed
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Anita,

I have not ever gotten a call from the Doctor. If he will not write a letter then I can only assume that he or she feels that Ms. Brunsting is more than capable of handling her financial affairs and making decisions regarding those. Recommending resignation as trustee is different than an opinion that Ms. Brunsting cannot serve in the capacity of Trustee. If the recommendation was that she reesign, and she wishes to do so, she need only call me and I will take care of the documentation. I will be happy to bring the documentation to her for her signature.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11/18/2010	8:10 AM	E-mail sent	email response to Anita Brunsting who has POA for Fianances for Nelva That yes mom can make gifts from DT and also advances from Inheritance of the DT to Descendants only. Referred her to Article 9 of the restated trust and all amendments thereafter.	Candace Freed
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Authorization for Release of Protected Health Information

**(Valid Authorization Under 45 CFR Chapter 164
and the Laws of the State of Texas)**

Statement of Intent

It is my understanding that Congress passed a law entitled the Health Insurance Portability and Accountability Act ("HIPAA") that limits use, disclosure or release of my individually identifiable health information (or, sometimes herein, "protected medical information"). This Authorization is being signed because it is crucial that my health care providers readily use, release or disclose my protected medical information to, or as directed by, that person or those persons designated in this Authorization in order to allow me the advantage of being able to discuss with, and obtain advice from, others or to facilitate decisions regarding my health care when I otherwise may not be able to discuss these matters with health care providers without regard to whether any health care provider has certified in writing that I am "incompetent" for purposes of the laws of the State of Texas.

Appointment of Authorized Persons

I, AMY RUTH BRUNSTING, an individual, hereby appoint the following persons, or any of them, as Authorized Persons for health care disclosure under the Standards for Privacy of Individually Identifiable Health Care Information (45 CFR Parts 160 and 164) under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the laws of the State of Texas:

ANITA KAY BRUNSTING

Grant of Authority

Therefore, as authorized by 45 CFR Sec(s). 164.502(a)(1)(i) and (iv), 164.502(a)(2)(i), 164.524 and 164.528, a covered entity (being a health care provider as defined by HIPAA) is permitted to use, release and disclose my individually identifiable health information pursuant to and in compliance with this valid Authorization.

I hereby authorize:

- a. All covered persons and entities as defined in HIPAA, including but not limited to a doctor (including but not limited to a physician, podiatrist, chiropractor, or osteopath), psychiatrist, psychologist, dentist, therapist, nurse, hospitals, clinics, pharmacy, laboratory, ambulance service, assisted living facility, residential care facility, bed and board facility, nursing home, medical insurance company or any other health care provider or affiliate,

- b. to use, release and disclose the following information at the request of an Authorized Person:

Any and all individually identifiable health care information, reports and/or records concerning my medical history, condition, diagnosis, testing, prognosis, treatment, billing information and identity of health care providers, whether past, present or future and any other information which is in any way related to my health care. Additionally, this disclosure shall include the ability to ask questions and discuss this protected medical information with the person or entity who has possession of the protected medical information even if I am fully competent to ask questions and discuss this matter at the time. It is my intention to give a full authorization for access to, disclosure and release of ANY protected medical information by or to the persons named in this Authorization as if each person were me;

- c. to, or as requested by, an Authorized Person.

Termination

This Authorization is not affected by, and shall not terminate by reason of, my subsequent disability or incapacity. This Authorization shall terminate on the first to occur of: (1) 1 year following my death or (2) upon my written revocation expressly referring to this Authorization and the date it is actually received by the covered entity. Proof of receipt of my written revocation may be by certified mail, registered mail, facsimile, or any other receipt evidencing actual receipt by the covered entity. Such revocation shall be effective upon the actual receipt of the notice by the covered entity except to the extent that the covered entity has taken action in reliance on it.

Re-disclosure

By signing this Authorization, I acknowledge that the information used, disclosed or released pursuant to this Authorization may be subject to re-disclosure by an Authorized Person whose names are written in paragraph 1 of this Authorization and the information once disclosed will no longer be protected by the rules created in HIPAA. No covered entity shall require an Authorized Person to indemnify the covered entity or agree to perform any act in order for the covered entity to comply with this Authorization.

Instructions to the Authorized Persons

An Authorized Person shall have the right to bring a legal action in any applicable forum against any covered entity that refuses to recognize and accept this Authorization for the purposes that I have expressed. Additionally, an Authorized Person is authorized to sign any documents that the Authorized Person deems appropriate to obtain use, disclosure or release of the protected medical information.

Effect of Duplicate Originals or Copies

If this Authorization has been executed in multiple counterparts, each counterpart original will have equal force and effect. An Authorized Person may make photocopies of this Authorization and each photocopy will have the same force and effect as the original.

My Waiver and Release

With regard information disclosed pursuant to this Authorization, I waive any right of privacy that I may have under the authority of the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 (HIPAA), any amendment or successor to that Act, or any similar state or federal act, rule or regulation. In addition, I hereby release any covered entity that acts in reliance on this Authorization from any liability that may accrue from the use or disclosure of my protected medical information in reliance upon this Authorization and for any actions taken by an Authorized Person.

Severability

I intend that this authorization conform to United States and Texas law. In the event that any provision of this document is invalid, the remaining provisions shall nonetheless remain in full force and effect.

I understand that I have the right to receive a copy of this authorization. I also understand that I have the right to revoke this authorization and that any revocation of this authorization must be in writing.

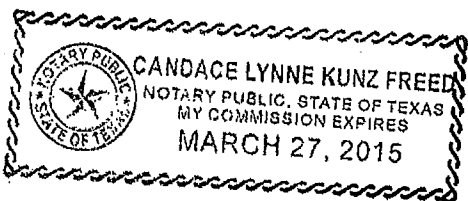
Dated: November 22, 2011

Amy Ruth Brunsting
AMY RUTH BRUNSTING
DOB: October 7, 1961

STATE OF TEXAS
COUNTY OF HARRIS

This instrument was acknowledged before me on November 22, 2011, by AMY RUTH BRUNSTING.

Candace Lynne Kunz Freed
Notary Public, State of Texas



Authorization for Release of Protected Health Information

**(Valid Authorization Under 45 CFR Chapter 164
and the Laws of the State of Texas)**

Statement of Intent

It is my understanding that Congress passed a law entitled the Health Insurance Portability and Accountability Act ("HIPAA") that limits use, disclosure or release of my individually identifiable health information (or, sometimes herein, "protected medical information"). This Authorization is being signed because it is crucial that my health care providers readily use, release or disclose my protected medical information to, or as directed by, that person or those persons designated in this Authorization in order to allow me the advantage of being able to discuss with, and obtain advice from, others or to facilitate decisions regarding my health care when I otherwise may not be able to discuss these matters with health care providers without regard to whether any health care provider has certified in writing that I am "incompetent" for purposes of the laws of the State of Texas.

Appointment of Authorized Persons

I, ANITA KAY BRUNSTING, an individual, hereby appoint the following persons, or any of them, as Authorized Persons for health care disclosure under the Standards for Privacy of Individually Identifiable Health Care Information (45 CFR Parts 160 and 164) under the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the laws of the State of Texas:

AMY RUTH BRUNSTING

Grant of Authority

Therefore, as authorized by 45 CFR Sec(s). 164.502(a)(1)(i) and (iv), 164.502(a)(2)(i), 164.524 and 164.528, a covered entity (being a health care provider as defined by HIPAA) is permitted to use, release and disclose my individually identifiable health information pursuant to and in compliance with this valid Authorization.

I hereby authorize:

- a. All covered persons and entities as defined in HIPAA, including but not limited to a doctor (including but not limited to a physician, podiatrist, chiropractor, or osteopath), psychiatrist, psychologist, dentist, therapist, nurse, hospitals, clinics, pharmacy, laboratory, ambulance service, assisted living facility, residential care facility, bed and board facility, nursing home, medical insurance company or any other health care provider or affiliate,

- b. to use, release and disclose the following information at the request of an Authorized Person:

Any and all individually identifiable health care information, reports and/or records concerning my medical history, condition, diagnosis, testing, prognosis, treatment, billing information and identity of health care providers, whether past, present or future and any other information which is in any way related to my health care. Additionally, this disclosure shall include the ability to ask questions and discuss this protected medical information with the person or entity who has possession of the protected medical information even if I am fully competent to ask questions and discuss this matter at the time. It is my intention to give a full authorization for access to, disclosure and release of ANY protected medical information by or to the persons named in this Authorization as if each person were me;

- c. to, or as requested by, an Authorized Person.

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This Authorization is not affected by, and shall not terminate by reason of, my subsequent disability or incapacity. This Authorization shall terminate on the first to occur of: (1) 1 year following my death or (2) upon my written revocation expressly referring to this Authorization and the date it is actually received by the covered entity. Proof of receipt of my written revocation may be by certified mail, registered mail, facsimile, or any other receipt evidencing actual receipt by the covered entity. Such revocation shall be effective upon the actual receipt of the notice by the covered entity except to the extent that the covered entity has taken action in reliance on it.

Re-disclosure

By signing this Authorization, I acknowledge that the information used, disclosed or released pursuant to this Authorization may be subject to re-disclosure by an Authorized Person whose names are written in paragraph 1 of this Authorization and the information once disclosed will no longer be protected by the rules created in HIPAA. No covered entity shall require an Authorized Person to indemnify the covered entity or agree to perform any act in order for the covered entity to comply with this Authorization.

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An Authorized Person shall have the right to bring a legal action in any applicable forum against any covered entity that refuses to recognize and accept this Authorization for the purposes that I have expressed. Additionally, an Authorized Person is authorized to sign any documents that the Authorized Person deems appropriate to obtain use, disclosure or release of the protected medical information.

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Dated: November 22, 2011

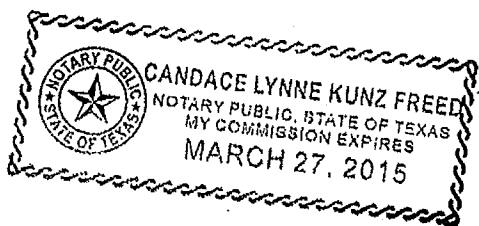
Anita Kay Brunsting
ANITA KAY BRUNSTING

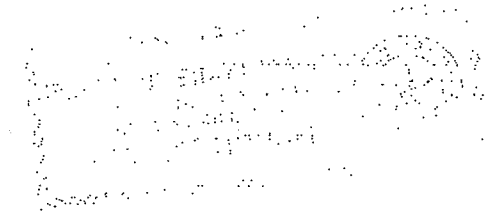
DOB: August 7, 1963

STATE OF TEXAS
COUNTY OF HARRIS

This instrument was acknowledged before me on November 22, 2011, by ANITA KAY BRUNSTING.

Candace Lynne Kunz Freed
Notary Public, State of Texas





AUTHORIZATION FOR RELEASE OF INFORMATION

We, ANITA KAY BRUNSTING and AMY RUTH BRUNSTING, Co-Trustees, hereby authorize the release of any and all documents and/or information requested by VACEK & FREED, PLLC regarding

NELVA ERLEEN BRUNSTING, also known as NELVA E. BRUNSTING;

ELMER HENRY BRUNSTING, also known as ELMER H. BRUNSTING; and/or
THE BRUNSTING FAMILY LIVING TRUST.

All requested documents and/or information can be released directly to VACEK & FREED, PLLC at the following address:


VACEK & FREED, PLLC
11777 Katy Freeway, Suite 300 South
Houston, Texas 77079


281-531-5800 or 800-229-3002
281-531-5885 - FAX

A copy of this signed release is also hereby authorized as acceptable.

If you have any questions regarding this authorization, please contact us as soon as possible.

DATED: November 22, 2011


ANITA KAY BRUNSTING, Co-Trustee of the
BRUNSTING FAMILY LIVING TRUST, dated
October 10, 1996, as amended


AMY RUTH BRUNSTING, Co-Trustee of the
BRUNSTING FAMILY LIVING TRUST, dated
October 10, 1996, as amended

	Notarization Date/Time	Document Date	Type of Notarization	Name of Signer	Signer's Signature	Signer's Address and Telephone Number
161	11/22/10	11/22/10		Shelley Gates	X Shelley Gates	14311 Islandwoods Dr, Houston TX 77045
162	11/24/10	11/24/10		Floy Stockdick	X Floy Stockdick	4011 Franz Katy, TX 77423
163	11/24/10	11/24/10		Roseanne Lopez	X Roseanne Lopez	6005 Franz Katy, TX 77427
164	12/1/10	12/1/10		Dr. C.V. Beghtol	X C.V. Beghtol	11434 Valley Spring Houston TX 77043
165	12/9/10	2/9/10		M. Chan	X M. Chan	21326 Rosehollow Houston/Katy TX 77450
166	12/14/10	12/14/10		Irene Kovar	X Irene Kovar	
167	12/21/10	12/21/10		Nelva Brunsting	X Nelva E. Brunsting	13630 Pinerock Houston TX 77077
168	12/21/10	2/21/10		Anita Brunsting	X Anita Brunsting	203 Bloomingdale Cir Victoria, TX 77904
169	12/21/10	12/21/10		Herbert E. McKay	X Herbert E. McKay	8016 Haffner Houston, Texas
170	12/29/10	12/29/10		Kyung Jacobs	X Kyung Jacobs	8326 Ash Garden Ct. Houston TX 77083
171	12/30/10	12/30/10		J.W. Burns	X J.W. Burns	10806 Inwood Hod. TX 77042
172	1/03/11	1/03/11		Kyung Jacobs	X Kyung Jacobs	8326 Ash Garden Ct. Houston, TX 77083
173	1/26/11	1/26/11		John Sutherland	X John A. Sutherland	415 Coachman Lane Houston TX 77024
174	1/26/11	1/26/11		Ellen Sutherland Daddi	X Ellen Sutherland Daddi	Podere Binacco 58020 Scarlino (GR) Italy
175	1/26/11	1/26/11		Karen Lee Cook	X Karen Lee Cook	3210 Deer Trail Bldg TX 77807
176	2/9/11	2/9/11		M. Chan	X M. Chan	21326 Rosehollow Ln Katy TX 77450

Type of Identification <input type="checkbox"/> D.L. <input type="checkbox"/> I.D. Card <input type="checkbox"/> Personally Known <input type="checkbox"/> Credible Witness <input type="checkbox"/> Passport <input type="checkbox"/> Other	Description of Document, Additional Information, or Comments	Fee	Signer's Right Thumbprint	
Personal Knowledge	HIPAA → PAT TRUSTEES DESIGNATION OF SUCCESSOR TEE Certa. of Tr.	\$ 0	Top of Thumbprint	161 Top of Thumbprint 162
Personal Knowledge	Qualified Benef. Design.	\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	Appt. of Succ Trustees Qualified Benef. Designation	\$	Top of Thumbprint	163 Top of Thumbprint 164
Personal Knowledge	Funding Pkg. COTS (ST) DT, LT (3) Med POA, HIPAA, QBD, APPT SUCC TEE Credible and AC knowl.	\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	Amended Affidavit/Oath.	\$	Top of Thumbprint	165 Top of Thumbprint 166
Personal Knowledge	Appt. of Succ Tee Resignation documents.	\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	COT's (3) Acceptance as ^{Succ} Trustee	\$	Top of Thumbprint	167 Top of Thumbprint 168
Personal Knowledge		\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	Beneficiary form for Chase IRA	\$	Top of Thumbprint	169 Top of Thumbprint 170
Personal Knowledge	Birth Certificate Correction	\$	Top of Thumbprint	Top of Thumbprint
P.K.		\$	Top of Thumbprint	171 Top of Thumbprint 172
Personal Knowledge	Farmers Insurance Claim Trustee Stmt for LT	\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	Resignation of Tee Med POA	\$	Top of Thumbprint	173 Top of Thumbprint 174
Personal Knowledge	Accept of Succ Co Tee COT; Delegation of Auth	\$	Top of Thumbprint	Top of Thumbprint
Personal Knowledge	Accept of Succ Co Tee Accept of Delegation COT	\$	Top of Thumbprint	175 Top of Thumbprint 176
Personal Knowledge	Funding (PMZ) Med POA; COT's (3) Deed HS, Deed other, Assign P/P.	\$	Top of Thumbprint	Top of Thumbprint

V&F002194

Notarization Date/Time	Document Date	Type of Notarization	Name of Signer	Signer's Signature	Signer's Address and Telephone Number
7/23/10	7/23/10	in office	Robert Holmes	X Robert Holmes	13218 Verbena Houston TX 77083
7/23/10	7/23/10	in office	Nancy Karistamave	X Nancy A. Karistamave	1873 Birchwood Dr. Okemos, MI 48864
7/27/10	7/27/10		Carol L. Naves	X Carol L. Naves	5206 Summerfield Dr Spring, TX 77379
7/27/10	7/27/10		Karen Renee Naves	X Karen Renee Naves	13819 CAPOUCOURT HOUSTON, TX 77077
7/27/10	7/27/10		Lisa Hanney	X Lisa Hanney	5706 Lone Cedar Boggswood, TX 77345
8/3/10	8/3/10	in office	Laurie Godbold	X Laurie Godbold	8148 Willow Forest Dr. Tomball TX 77315
8/10/10	8/10/10	"	"	X Laurie Godbold	"
8/17/10	8/17/10		Irene R. Goddard	X Irene R. Goddard	1570 Brecky Bend Katy TX 77494
			Fred Ben Himbury	Fred Ben Himbury	
			Patricia Rhea Mullins	Patricia Rhea Mullins	
			Suzan Faye Stringer	Suzan Faye Stringer	
			Phyllis Himbury Delane	Phyllis Himbury Delane	
8/25/10			Nelva Braunsting	X Nelva E. Braunsting	15630 Piping Rock HOUSTON TX 77079
8/26/10			Betty Jean Baaney	X Betty Jean Baaney	8915 Opelika HOUSTON TX 77080
9/8/10			Mark R. Yarbrough	X Mark R. Yarbrough	#101 Morrey Ave. Bldg 3102 Austin TX 78749
9/8/10			Jeffrey S. Yarbrough	X Jeffrey S. Yarbrough	2617 Piping Rock Tr. Austin TX 78748

Type of Identification <input type="checkbox"/> D.L. <input type="checkbox"/> I.D. Card <input type="checkbox"/> Personally Known <input type="checkbox"/> Credible Witness <input type="checkbox"/> Passport <input type="checkbox"/> Other	Description of Document, Additional Information, or Comments	Fee	Signer's Right Thumbprint	
Personal Knowledge	Merrill Lynch DT Merrill Lynch ST	\$	Top of Thumbprint	129 130
Personal Knowledge	COT for Noyes Fut	\$	Top of Thumbprint	131 132
Personal Knowledge	COT for Noyes FLT	\$	Top of Thumbprint	133 134
Personal Knowledge	COT for Noyes Family living trust	\$	Top of Thumbprint	135 136
COTS(S) Personal Knowledge	COTS(S) Funding Bks.	\$	Top of Thumbprint	137 138
" "	Funding forms	\$ —	Top of Thumbprint	139 140
Personal Knowledge	Funding Bk.	\$	Top of Thumbprint	141 142
		\$	Top of Thumbprint	143 144
		\$	Top of Thumbprint	145 146
		\$	Top of Thumbprint	147 148
P.K.		\$	Top of Thumbprint	149 150
Personal Knowledge	QBD, COTS(3) MEDPOA, DGPOA, APPT SUCC TEE DEED.	\$	Top of Thumbprint	151 152
Personal Knowledge	SS4 COTS Aff of Heir Mtr. Vehicle (a)	\$	Top of Thumbprint	153 154
Personal Knowledge	SS4 Aff. Heirship for Mtr. Veh (a)	\$	Top of Thumbprint	155 156