

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

14800 St. Mary's Lane, Suite 230
Houston, Texas 77079
(281) 531-5800
1-800-229-3002
Telefax (281) 531-5885
E-mail Address: consult@vacek.com

January 27, 2011

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

Re: The Brunsting Family Living Trust

Dear Ms. Brunsting:

For your benefit, we have outlined in this letter the terms of our engagement, the services we will be providing to you, and our firm's billing practice. You will want to keep this engagement letter for future reference regarding this matter.

Terms of Engagement

We will make all requested updates to your mother's existing plan. All documents prepared will be billed according to our firm's standard fees for said documents. If any real estate deeds need to be recorded, the county clerk's filing fees will be billed as an expense and as they are incurred.

Legal Fees

It is our firm's practice to document our representation of clients and to confirm our fee arrangement with them. In this regard, please be advised of the following:

1. **Criteria.** Our firm's fees are based on the criteria considered as a guide in determining the reasonableness of the fee as specified in the Attorney Code of Professional Responsibility, as adopted by the Texas Supreme Court. These criteria include the time and labor required for tasks performed; the difficulty, novelty or complexity of the problem presented; the skill required to perform the tasks in a professional manner; the time constraints imposed by the client or the nature of the matter; the fee customarily charged in the community for similar services; the amount involved and the results obtained for the client;

and the experience, reputation and ability of the lawyer or lawyers performing the services.

2. **Fee.** Administration for the Trust, including phone calls, written communications, and meetings, will be performed at the hourly rates as listed below:

Susan S. Vacek	\$300.00
Candace L. Kunz-Freed	\$200.00
Bernard L. Mathews, III	\$200.00
Legal Assistant	\$90.00

Copies made and faxes received will be billed at \$0.20 per a page.

If a formal probate procedure is required for your father's Pour-Over Will, an legal probate fee plus filing fees and expenses will be added to our standard fee. The probate matter will be further discussed in a separate engagement contract, if it becomes necessary.

If at any time and for any reason during this engagement, you as the client and Trustee, or we as VACEK & FREED, PLLC, choose to terminate legal services, under the absolute discretion of the attorney handling the administration of this Trust, you will be billed at the hourly rate of the attorney and/or staff, as the case may be, for work produced to the date of termination of services. "Work produced" will include but not be limited to, all documents produced by the legal assistant(s) and/or reviewed by the attorney(s); compilation and/or review of asset information for asset valuation purposes, including copies at \$0.25 per a copy; and communications via telephone, e-mail and/or written correspondence to you. A final statement that includes the hourly fees for the above will be provided to you along with any original documents we have in our files.

3. **Billing Procedure.** We request no retainer at this time. You will, however, receive monthly or periodic statements during the administration period, and billing and expenses will be included on these statements.

In the event additional services are required beyond what we have initially discussed, we will take no further action until you have been notified and additional fees to cover such additional services are mutually agreed upon.

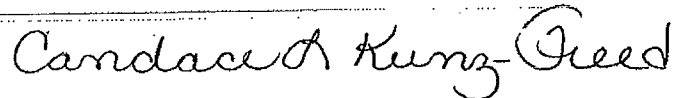
Remember, as the Trustee, you continue to have a fiduciary duty to the beneficiaries of the Trust, including the remainder beneficiaries of the Trust, to maintain trust assets as a prudent investor by considering the purposes, terms, distribution requirements, and other circumstances of the Trust. As Trustee, you should continue to exercise reasonable care,

skill, and caution in fulfilling these responsibilities and always act in the best interest of the beneficiaries.

The terms of this engagement as outlined above are guaranteed for **thirty (30) days from the date of this letter** (herein referred to as the "engagement guarantee period"). To ensure the terms and rates discussed herein, the signed "law firm copy" of this engagement letter contract must be received in our office before the end of the engagement guarantee period. You are hereby given notice that after the end of the engagement guarantee period, the terms and rates of engagement are subject to change according to the discretion of VACEK & FREED, PLLC. Should you wish to engage our firm after the expiration of the engagement guarantee period, you must contact our firm to speak with me directly. A new engagement letter contract or addendum may be required. Such determination will be made at that time.

We will begin working on your engagement only upon receipt of the executed copy of this engagement contract.

Very truly yours,



Candace L. Kunz-Freed

AGREED AND ACCEPTED on

Feb. 7, 2011



ANITA KAY BRUNSTING, Trustee

CLF/sp

NAPA VALLEY

**ANITA KAY BRUNSTING, TEE OF THE NELVA E
BRUNSTING SURVIVOR'S TR** DTD 4/1/09 7003

AS EST UTD 10/10/96 32-21110 TX
5551
203 BLOOMINGDALE CIR
VICTORIA TX 77904-3049

Jan. 19, 2011
DATE

PAY TO THE ORDER OF Vacek & Freed, PLLC \$ 880.15

Eight hundred eighty & 15/100 DOLLARS

Bank of America

ACH REF: 111000025

FOR Jan 10/11/4 Anita Kay Brunsting

⑆111000025⑆ 008519001143⑈7003

VACEK & FREED, PLLC
Client Billing Sheet - Administration

Date: 1/24/11 Initials: CF/SEP Paid: 880.15

Client Name: Brunsting, Nelva Due: Monthly

Sign Date: _____ Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$	<input type="checkbox"/> QBD	\$
<input type="checkbox"/> IRA Trust	\$	<input type="checkbox"/> COT	\$
<input type="checkbox"/> Restatement	\$	<input type="checkbox"/> Appt Succ Fee	\$
<input type="checkbox"/> Amendment only	\$	<input type="checkbox"/> Probate	\$
<input type="checkbox"/> H/S Amendment	\$	<input type="checkbox"/> Filing Fees (Probate)	\$
<input type="checkbox"/> HIPAA Amendment	\$	<input type="checkbox"/> PM2	\$
<input type="checkbox"/> Deed	\$	<input type="checkbox"/> 706	\$
<input type="checkbox"/> HC - Living Will	\$	<input type="checkbox"/> Instruction Letters	\$
<input type="checkbox"/> HC - Medical POA	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> HC - HIPAA Authorization	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Power of Atty	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Other Ancillary	\$	<input type="checkbox"/> Discount Allowed per	\$

**Place original in accounting box upon completion of each appointment.

ADMINISTRATION USE ONLY

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
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Houston, Texas 77079
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Telefax (281) 531-5885
E-mail Address: consult@vacek.com

July 27, 2011

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

Re: The Brunsting Family Living Trust, Nelva E. Brunsting Survivor's Trust, and
the Elmer H. Brunsting Decedent's Trust

Dear Ms. Brunsting:

For your benefit, we have outlined in this letter the terms of our engagement for matters related to the above Trust and our firm's billing practice.

Terms of Engagement

All matters pertaining to the Trust, including but not limited to phone calls, written communications, and meetings with any party in connection with this matter will be performed at the hourly rates as listed in the following section.

Legal Fees

It is our firm's practice to document our representation of clients and to confirm our fee arrangement with them. In this regard, please be advised of the following:

- a. **Criteria.** Our firm's fees are based on the criteria considered as a guide in determining the reasonableness of the fee as specified in the Attorney Code of Professional Responsibility, as adopted by the Texas Supreme Court. These criteria include the time and labor required for tasks performed; the difficulty, novelty or complexity of the problem presented; the skill required to perform the tasks in a professional manner; the time constraints imposed by the client or the nature of the matter; the fee customarily charged in the community for similar services; the amount involved and the results obtained for the client;

and the experience, reputation and ability of the lawyer or lawyers performing the services.

- b. **Fee.** All matters for the Trust, including phone calls, written communications, and meetings, will be performed at the hourly rates as listed below:

Susan S. Vacek	\$300.00
Candace L. Kunz-Freed	\$250.00
Bernard L. Mathews, III	\$200.00
Legal Assistant	\$90.00

Note that the hourly rates listed above have increased, effective April 1, 2011.

Any copies made and faxes received will be billed at \$0.20 per a page.

If at any time and for any reason during this engagement, you as the client and Trustee, or we as VACEK & FREED, PLLC, choose to terminate legal services, under the absolute discretion of the attorney handling the administration of this Trust, you will be billed at the hourly rate of the attorney and/or staff, as the case may be, for work produced to the date of termination of services. "Work produced" will include but not be limited to, all documents produced by the legal assistant(s) and/or reviewed by the attorney(s); compilation and/or review of asset information for asset valuation purposes, including copies at \$0.25 per a copy; and communications via telephone, e-mail and/or written correspondence to you. A final statement that includes the hourly fees for the above will be provided to you along with any original documents we have in our files.

- c. **Billing Procedure.** We request a retainer in the amount of \$1,000.00 to be held in our retainer account as a guarantee of payment. You will receive monthly or periodic statements during the administration period, and billing and expenses will be applied against such retainer. If at anytime the retainer is as low as \$250.00, or less, we may require the said retainer to be replenished. When we complete our representation, we will apply the balance of your retainer against our final statement and refund any excess funds.

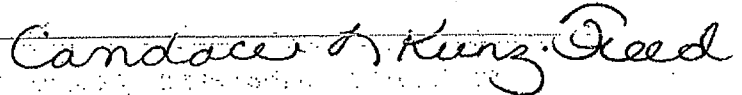
Note that in order for us to proceed working on this matter, you must submit the retainer to our office. Until such time that we have received the retainer, we are holding this matter and will not perform any work on it.

The terms of this engagement as outlined above are guaranteed for **thirty (30) days from the date of this letter** (herein referred to as the "engagement guarantee period"). To

ensure the terms and rates discussed herein, the signed "law firm copy" of this engagement letter contract must be received in our office before the end of the engagement guarantee period. You are hereby given notice that after the end of the engagement guarantee period, the terms and rates of engagement are subject to change according to the discretion of VACEK & FREED, PLLC. Should you wish to engage our firm after the expiration of the engagement guarantee period, you must contact our firm to speak with me directly. A new engagement letter contract or addendum may be required. Such determination will be made at that time.

We will begin working on your engagement only upon receipt of the above-requested retainer and the executed copy of this engagement contract. Please sign both copies of the enclosed engagement letter, and return the copy marked "law firm copy" to our office in the enclosed envelope along with the prescribed retainer fee. At such time that the signed engagement letter and retainer fee are received in our office, we will proceed with any work needed at that time.

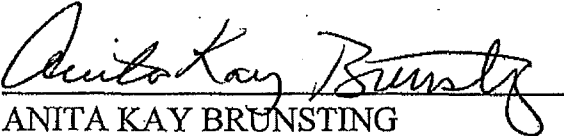
Very truly yours,



Candace L. Kunz-Freed

AGREED AND ACCEPTED on

Aug. 5, 2011



ANITA KAY BRUNSTING

CLF/sp

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
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(281) 531-5800
1-800-229-3002
Telefax (281) 531-5885
E-mail Address: consult@vacek.com

December 8, 2011

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

Ms. Amy Ruth Brunsting, Co-Trustee
2582 Ledge
New Braunfels, TX 78132

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

Dear Brunsting Co-Trustees:

I enjoyed meeting with you both when you were in my office last. We are glad that we may be of assistance to you during this special time of need, and we look forward to working with you closely to complete the trust distribution according to the terms of the Brunsting Family Living Trust.

For your benefit, we have outlined in this letter the terms of our engagement, the services we will be providing to you, and our firm's billing practice.

Terms of Engagement

If the trusts have been properly funded, there should be *no need to establish a formal probate* for your mother's assets. We will determine whether or not a formal probate is necessary after reviewing the title to all estate assets.

As you know, our firm specializes in assisting families in these areas. Although each case is different, in your situation we anticipate assisting you and your other advisors in connection with the following major areas:

1. Valuation of all assets and recommendations regarding distribution to the beneficiaries by means of the Personal Asset Trusts;

2. Working with your CPA and investment advisors, if requested by you, to make sure the Trust assets are maintained and accounted for in a manner consistent with your parents' Living Trust; and
3. Coordinating the distribution of trust assets to the beneficiaries through the Personal Asset Trusts created under the terms of the Trust.

For your benefit each of these tasks is discussed in greater detail below.

1. **Asset Valuation Issues.** The IRS requires the securities to be valued at the "mean" of the high and low trading values on November 11, 2011. The cash balance of all bank accounts needs to be valued as of the date of death. The insurance should be valued based on the death benefits received, as documented by an IRS Form 712 issued by each insurance company; the annuity companies should also furnish a value for each annuity. *We will be working with you on obtaining these IRS valuations for the various assets.* Please keep in mind that the more information you gather and provide to our office, the less time for which we will have to bill you.

New Cost Basis. The asset values also establish a new income tax basis, which will be used for purposes of computing capital gains tax in the event of a future sale. This can be extremely important to you, since it could minimize any capital gains tax that you would otherwise pay as a result of a sale of the assets in the estate.

Please note new basis will apply only to Survivor's Trust assets. All Decedent's Trust assets will keep basis it went in or thereafter acquired. One major exception to this change in basis is for annuities and retirement (IRA) accounts, which have a "carry-over" tax basis at death.

2. **Coordinating With Your CPA and Brokers.** We will work with your designated investment advisors, at your request, in restyling the individual securities and investments into the new Personal Asset Trust accounts, ensuring that the proper tax identification numbers are assigned to each account and asset.

In addition to working with your brokers, we will be in close contact with your CPA, if necessary, to ensure the individual and Trust income tax returns will be prepared consistent with the trusts created under the estate planning documents.

- 3. Distribution of Assets to Beneficiaries.** The final step in the administration of your mother's estate is the distribution of assets to the beneficiaries. Such distribution under the terms of the Trust with respect to the creation of Personal Asset Trusts for each beneficiary. There are pitfalls to be avoided with regard to capital gains tax and income tax on income to the estate, as well as income with respect to your mother. We will guide you through some of these potential fiduciary problems as you fulfill your duty to the Trust, as well as to the beneficiaries.

It is recommended, a Family Settlement Agreement be prepared so that all beneficiaries acknowledge by signature their agreement to a non-prorata land distribution. Any Family Settlement Agreement is specific to the estate or trust and requires extensive drafting. Therefore, it is billed according to the hourly fees discussed below.

Legal Fees

It is our firm's practice to document our representation of clients and to confirm our fee arrangement with them. In this regard, please be advised of the following:

- 1. Criteria.** Our firm's fees are based on the criteria considered as a guide in determining the reasonableness of the fee as specified in the Attorney Code of Professional Responsibility, as adopted by the Texas Supreme Court. These criteria include the time and labor required for tasks performed; the difficulty, novelty or complexity of the problem presented; the skill required to perform the tasks in a professional manner; the time constraints imposed by the client or the nature of the matter; the fee customarily charged in the community for similar services; the amount involved and the results obtained for the client; and the experience, reputation and ability of the lawyer or lawyers performing the services.
- 2. Fee.** Administration and dsitribution for the Trust, including phone calls, written communications, and meetings, will be performed at the hourly rates as listed below:

Susan S. Vacek	\$300.00
Candace L. Kunz-Freed	\$250.00
Bernard L. Mathews, III	\$200.00
Legal Assistant	\$90.00

As previously stated, the more information provided by you, the less time we will have to acquire on your behalf and bill you.

Copies made and faxes received will be billed at \$0.20 per a page.

If a formal probate procedure is required for the Pour-Over Will, an additional legal probate fee plus filing fees and expenses will be added to our standard fee. The probate matter will be further discussed in a separate engagement contract, if it becomes necessary.

If at any time and for any reason during this engagement, you as the client and Trustee, or we as VACEK & FREED, PLLC, choose to terminate legal services, under the absolute discretion of the attorney handling the administration of this Trust, you will be billed at the hourly rate of the attorney and/or staff, as the case may be, for work produced to the date of termination of services. "Work produced" will include but not be limited to, all documents produced by the legal assistant(s) and/or reviewed by the attorney(s); compilation and/or review of asset information for asset valuation purposes, including copies at \$0.25 per a copy; and communications via telephone, e-mail and/or written correspondence to you. A final statement that includes the hourly fees for the above will be provided to you along with any original documents we have in our files.

3. **Billing Procedure.** We request a retainer in the amount of \$4,500.00 to be held in our retainer account as a guarantee of payment. You will receive monthly or periodic statements during the administration period, and billing and expenses will be applied against such retainer. If at anytime the retainer is as low as \$750.00, or less, we may require the said retainer to be replenished. When we complete our representation, we will apply the balance of your retainer against our final statement and refund any excess funds.

Note that in order for us to proceed working on this matter, you must submit the retainer to our office. Until such time that we have received the retainer, we are holding this matter and have ceased work on it.

In the event additional services are required that are not covered by this engagement letter, we will take no further action until you have been notified and additional fees to cover such additional services are mutually agreed upon.

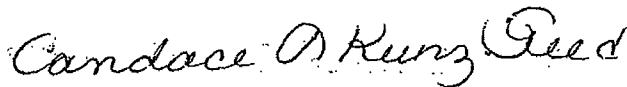
As the acting Co-Trustees, you both have a fiduciary duty to the beneficiaries of the Trust, including the remainder beneficiaries of the Trust, to maintain trust assets as a prudent investor by considering the purposes, terms, distribution requirements, and other circumstances of the Trust. As Co-Trustees, you both should exercise reasonable care, skill,

and caution in fulfilling these responsibilities and always act in the best interest of the beneficiaries.

The terms of this engagement as outlined above are guaranteed for **thirty (30) days from the date of this letter** (herein referred to as the "engagement guarantee period"). To ensure the terms and rates discussed herein, the signed "law firm copy" of this engagement letter contract must be received in our office before the end of the engagement guarantee period. You are hereby given notice that after the end of the engagement guarantee period, the terms and rates of engagement are subject to change according to the discretion of VACEK & FREED, PLLC. Should you wish to engage our firm after the expiration of the engagement guarantee period, you must contact our firm to speak with me directly. A new engagement letter contract or addendum may be required. Such determination will be made at that time.

We will begin working on your engagement only upon receipt of complete asset information, the above-requested retainer, and the executed copy of this engagement contract. We hope to have the engagement substantially completed within *six to nine months* thereafter.

Very truly yours,

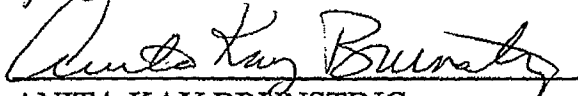


Candace L. Kunz-Freed

This engagement letter may be signed in counterparts, each of which is deemed an original and true copy.

AGREED AND ACCEPTED on

Dec. 11, 2011



ANITA KAY BRUNSTING

AGREED AND ACCEPTED on

_____, 2011

AMY RUTH BRUNSTING

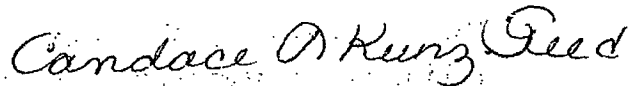
CLF/sp

and caution in fulfilling these responsibilities and always act in the best interest of the beneficiaries.

The terms of this engagement as outlined above are guaranteed for **thirty (30) days from the date of this letter** (herein referred to as the "engagement guarantee period"). To ensure the terms and rates discussed herein, the signed "law firm copy" of this engagement letter contract must be received in our office before the end of the engagement guarantee period. You are hereby given notice that after the end of the engagement guarantee period, the terms and rates of engagement are subject to change according to the discretion of VACEK & FREED, PLLC. Should you wish to engage our firm after the expiration of the engagement guarantee period, you must contact our firm to speak with me directly. A new engagement letter contract or addendum may be required. Such determination will be made at that time.

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Very truly yours,



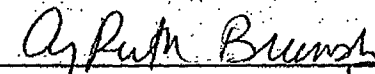
Candace L. Kunz-Freed

This engagement letter may be signed in counterparts, each of which is deemed an original and true copy.

AGREED AND ACCEPTED on
_____, 2011

ANITA KAY BRUNSTING

AGREED AND ACCEPTED on
December 13, 2011



AMY RUTH BRUNSTING

CLF/sp

VACEK & FREED, PLLC

14800 St. Mary's Lane, Suite 230
Houston, TX 77079
(281) 531-5800
1-800-229-3002

Estate of Elmer H. Brunsting
c/o Anita Kay Brunsting, Trustee
203 Bloomingdale Circle
Victoria, TX 77904

12/23/2010

Invoice # 10114

STATEMENT

Previous balance \$290.81
Total payments (\$290.81)

Professional Services

			<u>Hours</u>	
10/25/10	Telephone conference with Client's children and successor Trustees regarding changes to be made to Trust and estate planning documents	CLF	1.00	\$200.00
12/21/10	Meeting with Client out of office for signing Resignation documents	CLF	0.50	\$100.00
10/25/10	Telephone conference fee	CLF	0.00	\$30.15
12/21/10	Resignation, Acceptance & Certificate of Trusts (3)	SKP	0.00	\$450.00
	Appointment of Successor Trustee	SKP	0.00	\$100.00
	Service fee for out of office notary signing	CLF	0.00	NO CHARGE

Balance due \$880.15

Billing Summary

Total for services rendered	\$300.00
Total expenses	\$580.15
Total payments and other transactions	(\$290.81)
Total previous balance	\$290.81
Balance Due Now	\$880.15

PAYMENT IS DUE UPON RECEIPT

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

V&F 002067

Thank you!

Summer Peoples

From: receipts@conferencemgr.com
Sent: 10/25/2010 5:59 PM
To: Summer Peoples
Subject: Conference Call Transaction Receipt



[Tell a friend](#) | [Log In](#)

Summer,

We hope you had a productive conference! We have charged your credit card for the following conference call. This e-mail will serve as your receipt. The charge will appear on your credit card bill as "Conference Call Services". If you have any questions, please contact customer support at conference-support@telephony.com or call 1-800-535-1005.

Date:10/25/2010
Start Time:4:57 PM CDT
End Time:5:58 PM CDT

PHONE NUMBER
1 (800) 511-7983
 ACCESS CODE
598-6417

TYPE	UNIT	RATE	COST
Conference-On-Demand Premium 800	267	\$0.10	\$26.70
FUSF Surcharge	1	\$3.44	\$3.45
TOTAL			\$30.15

	START	END	CALLER NUMBER	MINUTES
1	4:57 PM	5:56 PM	281-531-5123	60
2	4:58 PM	5:56 PM	830-625-8352	59
3	4:59 PM	5:33 PM	713-560-6381	35
4	4:59 PM	5:56 PM	361-550-7132	57
5	5:00 PM	5:56 PM	925-938-1603	56

- 5 Total Calls
- 5 Peak number of active lines

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ELMER H. BRUNSTING 09-98
 NELVA E. BRUNSTING
 13830 PINEROCK
 HOUSTON, TX 77079

006647

32-2/1110 TX
 8519

8/31/10

Pay to the order of Vacker & Freed \$ 368.00
 Three hundred sixty-eight and no/100 00 Dollars

Bank of America

Bank of America Advantage®

ACH R/T 111000025

Nelva E. Brunsting

⑆111000025⑆ 008519001143⑆6647

Member FDIC

ADMINISTRATION USE ONLY

VACKER & FREED, PLLC
 Client Billing Sheet - Administration

Date: 9/7/10

Initials: CFE

Paid: 368-

Client Name: Brunsting Elmer & Nelva

Due: pd in full

Sign Date: _____

Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$	<input type="checkbox"/> QBD	\$
<input type="checkbox"/> IRA Trust	\$	<input type="checkbox"/> COT	\$
<input type="checkbox"/> Restatement	\$	<input type="checkbox"/> Appt Succ Tee	\$
<input type="checkbox"/> Amendment only	\$	<input type="checkbox"/> Probate	\$
<input type="checkbox"/> H/S Amendment	\$	<input type="checkbox"/> Filing fees (Probate)	\$
<input type="checkbox"/> HIPAA Amendment	\$	<input type="checkbox"/> PM2	\$
<input type="checkbox"/> Deed	\$	<input type="checkbox"/> 706	\$
<input type="checkbox"/> HC - Living Will	\$	<input type="checkbox"/> Instruction Letters	\$
<input type="checkbox"/> HC - Medical POA	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> HC - HIPAA Authorization	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Power of Atty	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Other Ancillary	\$	<input type="checkbox"/> Discount Allowed per	\$

**Place original in accounting box upon completion of each appointment.

V&F 002070

VACEK & FREED, PLLC

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

Estate of Elmer H. Brunsting
c/o Anita Kay Brunsting, Trustee
203 Bloomingdale Circle
Victoria, TX 77904

03/29/2011

Invoice # 10181

STATEMENT

Previous balance \$340.00
Total payments (\$340.00)

Professional Services

			Hours	
02/15/11	File Review of funding letters and related documents	CLF	0.50	\$100.00
02/23/11	File Review of Trust and drafted Qualified Beneficiary Designation	BLM	0.70	\$140.00
03/10/11	Phone call from Client regarding signing Qualified Beneficiary Designation and setting appointment to meet with attorney to discuss same	SKP	0.20	\$18.00
03/12/11	Meeting with Client and Trustee	CLF	1.00	\$200.00
02/16/11	Funding Letters	SKP	0.00	\$60.00
	Copies of Funding Letters and related forms for transfer	SKP	0.00	\$8.80
	Postage to mail Funding Letters and related forms for transfer companies	SKP	0.00	\$2.07
03/16/11	Copies of Exxon Mobil transfer papers	SKP	0.00	\$5.80
	Service Fee for Federal Express delivery to Exxon Mobil	SKP	0.00	\$17.56
03/22/11	Service Fee for Federal Express delivery to BNY Mellon	SKP	0.00	\$17.56
	Copies of BNY Mellon Chevron transfer papers	SKP	0.00	\$5.80
Balance due				\$575.59

Billing Summary

Total for services rendered	\$458.00
Total expenses	\$117.59
Total payments and other transactions	(\$340.00)
Total previous balance	\$340.00
Balance Due Now:	\$575.59

PAYMENT IS DUE UPON RECEIPT

PLEASE MAKE CHECK PAYABLE TO
VACEK & FREED, PLLC

V&F 002071

ANITA KAY BRUNSTING, TEE OF THE NELVA E
 BRUNSTING SURVIVOR'S TR. DTD 4/1/09
 AS EST UTD 10/10/96
 203 BLOOMINGDALE CIR
 VICTORIA TX 77904-3049

7006
 32-2/1110 TX
 5551

Mar 9, 2011 date

PAY to the order of Vacek & Freed \$ 340.00
Three hundred forty dollars & 00/100 dollars

Bank of America
 ACH R/T 111000025

for inv # 10149 Charles E. Brunsting

⑆ 000025⑆ 008519001143⑆ 7006

VACEK & FREED, PLLC
 Client Billing Sheet - Administration

Date: 3/9/11 Initials: SCLF Paid: 340

Client Name: Brunsting, Nelva Due: hourly

Sign Date: _____ Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$	<input type="checkbox"/> QBD	\$
<input type="checkbox"/> IRA Trust	\$	<input type="checkbox"/> COT	\$
<input type="checkbox"/> Restatement	\$	<input type="checkbox"/> Appt Succ Fee	\$
<input type="checkbox"/> Amendment only	\$	<input type="checkbox"/> Probate	\$
<input type="checkbox"/> H/S Amendment	\$	<input type="checkbox"/> Filing Fees (Probate)	\$
<input type="checkbox"/> HIPAA Amendment	\$	<input type="checkbox"/> PM2	\$
<input type="checkbox"/> Deed	\$	<input type="checkbox"/> 706	\$
<input type="checkbox"/> HC - Living Will	\$	<input type="checkbox"/> Instruction Letters	\$
<input type="checkbox"/> HC - Medical POA	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> HC - HIPAA Authorization	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Power of Atty	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Other Ancillary	\$	<input type="checkbox"/> Discount Allowed per	\$

**Place original in accounting box upon completion of each appointment

ADMINISTRATION USE ONLY



VACEK & FREED, PLLC

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

Brunsting Family Living Trust
c/o Anita Brunsting, Trustee
203 Bloomingdale Circle
Victoria, TX 77904

09/20/2011

Invoice # 10362

STATEMENT

Total payments (\$1,000.00)

Professional Services

- 07/22/11 Phone call with Client regarding providing copies to the office of Jim Blackburn, attorney for Carl Brunsting Candace Freed
07/25/11 Phone call with Client regarding distribution of trust assets to beneficiaries Candace Freed
07/29/11 Phone call with Client Candace Freed
08/09/11 Phone call with Client regarding providing copies of Living Trust and related documents to attorney Jim Blackburn in response to his call to our office Summer Peoples
08/11/11 Correspondence via e-mail with Client regarding copies of Trust documents to be provided to Blackburn's office Candace Freed
09/06/11 Correspondence via e-mail with attorney Jim Blackburn; e-mail Client regarding action needed Candace Freed
09/08/11 Correspondence via e-mail with attorney Jim Blackburn and Client regarding Trust copies requested Candace Freed
08/18/11 Service Fee for Federal Express delivery to Client Summer Peoples
Pre-paid postage for Client to mail Trust copies to Jim Blackburn Summer Peoples

Total for professional services rendered 2.30 \$555.24

Credit balance (\$444.76)

Billing Summary

Table with 2 columns: Description, Amount. Rows include Total for services rendered (\$527.00), Total expenses (\$28.24), Total payments and other transactions (\$1,000.00), Total previous balance (\$0.00).

Balance Due Now: (\$444.76)

*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 002073

ANITA KAY BRUNSTING, TEE OF THE NELVA E
 BRUNSTING SURVIVOR'S TR DTD 4/1/09 7025
 AS EST UTD 10/10/86
 203 BLOOMINGDALE CIR
 VICTORIA TX 77904-3049

Aug 16, 2011 Due 322/1110 TX 5551

Pay to the Order of Vacek & Freed \$ 1,000.00
One thousand & 00/100 Dollars

Bank of America
 ACH R/T 111000025

For retainer Anita K Brunsting

⑆1110000025⑆ 008519001143⑆7025



VACEK & FREED, PLLC
 Client Billing Sheet - Administration

Date: 8/29/11

Initials: CF

Paid: 1600-

Client Name: Brunsting, Nelva

Due: Retainer

Sign Date: _____

Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$ _____	<input type="checkbox"/> QBD	\$ _____
<input type="checkbox"/> IRA Trust	\$ _____	<input type="checkbox"/> COT	\$ _____
<input type="checkbox"/> Restatement	\$ _____	<input type="checkbox"/> Appt Succ Tee	\$ _____
<input type="checkbox"/> Amendment only	\$ _____	<input type="checkbox"/> Probate	\$ _____
<input type="checkbox"/> H/S Amendment	\$ _____	<input type="checkbox"/> Filing Fees (Probate)	\$ _____
<input type="checkbox"/> HIPAA Amendment	\$ _____	<input type="checkbox"/> PM2	\$ _____
<input type="checkbox"/> Deed	\$ _____	<input type="checkbox"/> 706	\$ _____
<input type="checkbox"/> HC - Living Will	\$ _____	<input type="checkbox"/> Instruction Letters	\$ _____
<input type="checkbox"/> HC - Medical POA	\$ _____	<input type="checkbox"/> _____	\$ _____
<input type="checkbox"/> HC - HIPAA Authorization	\$ _____	<input type="checkbox"/> _____	\$ _____
<input type="checkbox"/> Power of Atty	\$ _____	<input type="checkbox"/> _____	\$ _____
<input type="checkbox"/> Other Ancillary	\$ _____	<input type="checkbox"/> Discount Allowed per _____	\$ _____

**Place original in accounting box upon completion of each appointment.

ADMINISTRATION USE ONLY

NAPA VALLEY

**ANITA KAY BRUNSTING, TEE OF THE NELVA E
BRUNSTING SURVIVOR'S TR. DTD 4/1/09** 7015

AS EST UTD 10/10/98
203 BLOOMINGDALE CIR
VICTORIA TX 77904-3049

32-71110 TX
5551

May 24 2011
DATE

PAY TO THE ORDER OF Vacek & Freed \$ 575.59

Five hundred seventy five & 59/100 DOLLARS

Bank of America

ACH # 111100025

FOR 10181

Anita Kay Brunsting

⑆ 111000025⑆ 008519001143⑈ 7015

ADMINISTRATION USE ONLY

**VACEK & FREED, PLLC
Client Billing Sheet - Administration**

Date: 6/1/11 Initials: CLF Paid: 575.59

Client Name: Brunsting Due: pd in full

Sign Date: _____ Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$	<input type="checkbox"/> QBD	\$
<input type="checkbox"/> IRA Trust	\$	<input type="checkbox"/> COT	\$
<input type="checkbox"/> Restatement	\$	<input type="checkbox"/> Appt Succ Tee	\$
<input type="checkbox"/> Amendment only	\$	<input type="checkbox"/> Probate	\$
<input type="checkbox"/> H/S Amendment	\$	<input type="checkbox"/> Filing Fees (Probate)	\$
<input type="checkbox"/> HIPAA Amendment	\$	<input type="checkbox"/> PM2	\$
<input type="checkbox"/> Deed	\$	<input type="checkbox"/> 706	\$
<input type="checkbox"/> HC Living Will	\$	<input type="checkbox"/> Instruction Letters	\$
<input type="checkbox"/> HC Medical POA	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> HC HIPAA Authorization	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Power of Atty	\$	<input type="checkbox"/>	\$
<input type="checkbox"/> Other Ancillary	\$	<input type="checkbox"/> Discount Allowed per	\$

V&F 002075

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VACEK & FREED, PLLC

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(281) 531-5800
1-800-229-3002

Estate of Nelva E. Brunsting
c/o Anita Kay Brunsting, Co-Trustee, &
Amy Ruth Brunsting, Co-Trustee
Victoria, TX 77904

11/29/2011

Invoice # 10445

STATEMENT

Table with columns for description, amount, and service provider. Includes rows for Previous balance, Professional Services (09/28/11, 11/22/11), and Total for professional services rendered.

Billing Summary

Summary table with columns for description and amount. Includes rows for Total for services rendered, Total expenses, Total payments and other transactions, Total previous balance, and Balance Due Now.

*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 002076



VACEK & FREED, PLLC

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

EM 12.28.11

Estate of Nelva E. Brunsting
c/o Anita Kay Brunsting, Co-Trustee, &
Amy Ruth Brunsting, Co-Trustee
Victoria, TX 77904

12/28/2011

Invoice # 10481

STATEMENT

Previous balance
Total payments

\$631.84
(\$4,500.00)

Professional Services

12/08/11	Telephone call with Co-Trustee for mailing address to add to file	Leticia Meador
12/12/11	Correspondence via e-mail with Client regarding home appraisal value and advise realtor's opinion recommended	Candace Freed
12/20/11	Correspondence via e-mail with Client regarding life insurance proceeds and deposit of same	Candace Freed
12/22/11	Data entry of information for Asset List	Leticia Meador

Total for professional services rendered

2.40 \$312.00

Credit balance

(\$3,556.16)

Billing Summary

Total for services rendered	\$312.00
Total expenses	\$0.00
Total payments and other transactions	(\$4,500.00)
Total previous balance	\$631.84
Balance Due Now:	(\$3,556.16)

**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

V&F 002077

PLEASE MAKE CHECK PAYABLE TO
VACEK & FREED, PLLC

NELVA E BRUNSTING SURVIVORS TRUST
 203 BLOOMINGDALE CIR
 VICTORIA TX 77904-3049

101
 35-2/1130.TX
 8519

Dec. 11, 2011

Pay To The Order of Vacek & Freed, PLLC \$ 4500.00
Four thousand-five hundred & 00/100

Bank of America

ACH R/T 111000025

Retainer Ante & Brunsting

⑆113000023⑆ 586027563523⑆0101



VACEK & FREED, PLLC
 Client Billing Sheet - Administration

Date: 12/15/11 Initials: CF Paid: 4500 (less \$631.84 withdrawn)

Client Name: Brunsting, Nelva E. Due: Retainer

Sign Date: _____ Seminar: _____

RATION USE ONLY

<input type="checkbox"/> Will	\$ _____	<input type="checkbox"/> QBD	\$ _____
<input type="checkbox"/> IRA Trust	\$ _____	<input type="checkbox"/> COT	\$ _____
<input type="checkbox"/> Restatement	\$ _____	<input type="checkbox"/> Appt Succ Tee	\$ _____
<input type="checkbox"/> Amendment only	\$ _____	<input type="checkbox"/> Probate	\$ _____
<input type="checkbox"/> H/S Amendment	\$ _____	<input type="checkbox"/> Filing Fees (Probate)	\$ _____
<input type="checkbox"/> HIPAA Amendment	\$ _____	<input type="checkbox"/> PM2	\$ _____

VACEK & FREED, PLLC
 Client Billing Sheet - Administration

Date: 12/15/11 Initials: CF Paid: 631.84

Client Name: Brunsting, Nelva Due: (withdrawal for retainer)

Sign Date: _____ Seminar: _____

ADMINISTRATION USE ONLY

<input type="checkbox"/> Will	\$ _____	<input type="checkbox"/> QBD	\$ _____
<input type="checkbox"/> IRA Trust	\$ _____	<input type="checkbox"/> COT	\$ _____
<input type="checkbox"/> Restatement	\$ _____	<input type="checkbox"/> Appt Succ Tee	\$ _____
<input type="checkbox"/> Amendment only	\$ _____	<input type="checkbox"/> Probate	\$ _____
<input type="checkbox"/> H/S Amendment	\$ _____	<input type="checkbox"/> Filing Fees (Probate)	\$ _____
<input type="checkbox"/> HIPAA Amendment	\$ _____	<input type="checkbox"/> PM2	\$ _____
<input type="checkbox"/> Deed	\$ _____	<input type="checkbox"/> 706	\$ _____
<input type="checkbox"/> HC - Living Will	\$ _____	<input type="checkbox"/> Instruction Letters	\$ _____
<input type="checkbox"/> HC - Medical POA	\$ _____		\$ _____
<input type="checkbox"/> HC - HIPAA Authorization	\$ _____		\$ _____
<input type="checkbox"/> Power of Atty	\$ _____		\$ _____

V&F 002078



emailed 1.12.12

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

VACEK & FREED, PLLC

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

01/12/2012

Invoice # 10497

STATEMENT

Previous balance			(\$3,556.16)
	Professional Services		
12/29/11	Phone call with Client regarding Edward Jones accounts and land; e-mail forms to Client for signature		Candace Freed
01/02/12	Correspondence via e-mail with Clients related to dividends and beneficiary issues		Candace Freed
01/03/12	File review of Trust and related documentation and information; update Asset List with basis information		Candace Freed
01/04/12	Telephone call with Edward Jones for account clarification; e-mail receipts of account information from Client regarding asset information; phone call with Clients regarding Personal Asset Trusts and other issues in response to beneficiary demand letter		Candace Freed
01/05/12	Draft letter to Client regarding Personal Asset Trusts and related information sheets; scan and e-mail copy of Will and Appointment of Successor Trustees to Clients to distribute to beneficiaries as needed		Summer Peoples
01/09/12	Correspondence via e-mail with Clients regarding distribution to beneficiaries		Candace Freed
01/03/12	E-mail received from Client		Leticia Meador
01/05/12	Postage to mail letters to Clients		Summer Peoples
Total for professional services rendered		3.40	\$757.08
Credit balance			(\$2,799.08)

Billing Summary

Total for services rendered	\$754.00
Total expenses	\$3.08
Total payments and other transactions	\$0.00
Total previous balance	(\$3,556.16)
Balance Due Now:	(\$2,799.08)

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

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VACEK & FREED, PLLC**

V&F 002079

Thank you!



VACEK & FREED, PLLC

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Houston, TX 77079
(281) 531-5800
1-800-229-3002

emailed 1.31.12

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 002080

Thank you!

VACEK & FREED, PLLC

14800 St. Mary's Lane, Suite 230
Houston, TX 77079
(281) 531-5800
1-800-229-3002

Estate of Elmer H. Brunsting
c/o Anita Kay Brunsting, Trustee
203 Bloomingdale Circle
Victoria, TX 77904

02/14/2011

Invoice # 10149

STATEMENT

Previous balance \$880.15
Total payments (\$880.15)

Professional Services

			<u>Hours</u>	
01/20/11	Phone call to investment center regarding account; review and complete forms for account	CLF	0.35	\$70.00
01/24/11	Phone call with Client regarding stock and changes to Trust in connection with Mrs. Brunsting's son's current needs	CLF	0.50	\$100.00
01/25/11	Correspondence via e-mail to advise Client to split stocks between both trusts; prepare forms for stock transfer	CLF	0.85	\$170.00

Balance due \$340.00

Billing Summary

Total for services rendered	\$340.00
Total expenses	\$0.00
Total payments and other transactions	(\$880.15)
Total previous balance	\$880.15
Balance Due Now:	\$340.00

PAYMENT IS DUE UPON RECEIPT

V&F 002081

PLEASE MAKE CHECK PAYABLE TO

emailed 2.14.12



VACEK & FREED, PLLC

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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

02/14/2012

Invoice # 10539

STATEMENT

Previous balance			(\$2,479.08)
	Professional Services		
01/25/12	Correspondence via e-mail with Co-Trustees regarding Personal Asset Trust selections and related form		Candace Freed
01/30/12	Correspondence via e-mail with Co-Trustees to schedule teleconference meeting with attorney		Summer Peoples
01/31/12	File review of Trust; telephone conference with Co-Trustees regarding Iowa farmland and other issues		Candace Freed
	Service Fee for telephone conference call		Summer Peoples
Total for professional services rendered		1.20	\$259.55
Credit balance			(\$2,219.53)

Billing Summary

Total for services rendered	\$252.00
Total expenses	\$7.55
Total payments and other transactions	\$0.00
Total previous balance	(\$2,479.08)
Balance Due Now	(\$2,219.53)

**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 002082

Summer Peoples

From: receipts@conferencemgr.com
 Sent: 01/31/2012 9:21 AM
 To: Summer Peoples
 Cc: Candace Freed
 Subject: Conference Call Transaction Receipt

added to TS.



Tell a friend | Log In

Summer,

We hope you had a productive conference! We have charged your credit card for the following conference call. This e-mail will serve as your receipt. The charge will appear on your credit card bill as "Conference Call Services". If you have any questions, please contact customer support at conference-support@telephony.com or call 1-800-535-1005.

Date: 1/31/2012
 Start Time: 8:55 AM CST
 End Time: 9:20 AM CST

PHONE NUMBER
1 (800) 511-7983
 ACCESS CODE
598-6417

TYPE	UNIT	RATE	COST
FreeConference Conference-On-Demand Premium 800	64	\$0.10	\$6.40
FUSF Surcharge	-	17.90%	\$1.15
		TOTAL	\$7.55

	START	END	CALLER NUMBER	MINUTES
1	8:55 AM	9:18 AM	281-217-0013	24
2	8:58 AM	9:18 AM	361-550-7132	21
3	8:59 AM	9:18 AM	830-625-8352	19

- 3 Total Calls
- 3 Peak number of active lines



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Summer Peoples

From: summary@freeconference.com
Sent: 01/31/2012 9:21 AM
To: Summer Peoples
Subject: Conference Call Summary

Added to TS.



[Tell a friend](#) | [Log In](#)

Conference Call Summary

Date: 1/31/2012
Start Time: 8:55 AM CST
End Time: 9:20 AM CST

PHONE NUMBER
 1 (800) 511-7983
 ACCESS CODE
 598-6417

	START	END	CALLER NUMBER	MINUTES
1	8:55 AM	9:18 AM	281-217-0013	24
2	8:58 AM	9:18 AM	361-550-7132	21
3	8:59 AM	9:18 AM	830-625-8352	19

3 Total Calls
 3 Peak number of active lines

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emailed 3.20.12

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(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

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

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VACEK & FREED, PLLC**

V&F 002086

Thank you!

Summer Peoples

From: receipts@conferencemgr.com
 Sent: 03/05/2012 9:43 AM
 To: Summer Peoples
 Cc: Candace Freed
 Subject: Conference Call Transaction Receipt

added to TS.



Tell a friend | Log In

Summer,

We hope you had a productive conference! We have charged your credit card for the following conference call. This e-mail will serve as your receipt. The charge will appear on your credit card bill as "Conference Call Services". If you have any questions, please contact customer support at conference-support@freeconference.com or call 1-800-535-1005.

Date: 3/5/2012
 Start Time: 8:51 AM CST
 End Time: 9:42 AM CST

PHONE NUMBER
1 (800) 511-7983
 ACCESS CODE
598-6417

TYPE	UNIT	RATE	COST
FreeConference Conference-On-Demand Premium 800	133	\$0.10	\$13.30
FUSF Surcharge	-	17.90%	\$2.39
TOTAL			\$15.69

	START	END	CALLER NUMBER	MINUTES
1	8:51 AM	9:40 AM	281-531-5800	50
2	8:59 AM	9:40 AM	830-625-8352	42
3	9:00 AM	9:40 AM	281-580-8100	41

- 3 Total Calls
- 3 Peak number of active lines



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Summer Peoples

From: summary@freeconference.com
Sent: 03/05/2012 9:43 AM
To: Summer Peoples
Subject: Conference Call Summary



[Tell a friend](#) | [Log In](#)

Conference Call Summary

Date: 3/5/2012
Start Time: 8:51 AM CST
End Time: 9:42 AM CST

PHONE NUMBER
 1 (800) 511-7983
ACCESS CODE
 598-6417

	START	END	CALLER NUMBER	MINUTES
1	8:51 AM	9:40 AM	281-531-5800	50
2	8:59 AM	9:40 AM	830-625-8352	42
3	9:00 AM	9:40 AM	281-580-8100	41

3 Total Calls
 3 Peak number of active lines

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dated 3.29.12

VACEK & FREED, PLLC

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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 002090

Thank you!

FedEx NEW Package
Express US Airbill

FedEx
Tracking
Number

8759 1399 8395

Original Wills to Clerk

SPH21

Form
ID No.

0215

Added to
TS

Sender's Copy

From - Please print and press hard.

Date 3/21/12 Sender's FedEx Account Number SENDER'S FED EX ACCOUNT NUMBER ONLY 0770-8458-3

Sender's Name Candace Freed Phone (281) 531-5800

Company VACEK & FREED PLLC

Address 11777 KATY FWY STE 300 Dept./Floor/Suite/Room

City HOUSTON State TX ZIP 77079

Your Internal Billing Reference Brunsting ORIGINAL
First 24 characters will appear on invoice.

To Recipient's Name Harris County Clerk Phone ()

Company Probate Dept.

Address Civil Courthouse 8th F. HOLD Weekday
We cannot deliver to P.O. boxes or P.O. ZIP codes. Dept./Floor/Suite/Room
FedEx location address
REQUIRED. NOT available for
FedEx First Overnight.

Address 201 Caroline HOLD Saturday
Use this line for the HOLD location address or for continuation of your shipping address. FedEx location address
REQUIRED. Available ONLY for
FedEx Priority Overnight and
FedEx 2Day to select locations.

City Houston State TX ZIP 77002

0437162241

4 Express Package Service *To most locations.
NOTE: Service order has changed. Please select carefully. Packages up to 150 lbs.
For packages over 150 lbs., use the new
FedEx Express Freight US Airbill.

Next Business Day	2 or 3 Business Days
<input type="checkbox"/> FedEx First Overnight Earliest next business morning delivery to select locations. Friday shipments will be delivered on Monday unless SATURDAY Delivery is selected.	<input type="checkbox"/> NEW FedEx 2Day A.M. Second business morning.* Saturday Delivery NOT available.
<input type="checkbox"/> FedEx Priority Overnight Next business morning.* Friday shipments will be delivered on Monday unless SATURDAY Delivery is selected.	<input checked="" type="checkbox"/> FedEx 2Day Second business afternoon.* Thursday shipments will be delivered on Monday unless SATURDAY Delivery is selected.
<input type="checkbox"/> FedEx Standard Overnight Next business afternoon.* Saturday Delivery NOT available.	<input type="checkbox"/> FedEx Express Saver Third business day.* Saturday Delivery NOT available.

5 Packaging *Declared value limit \$500.
 FedEx Envelope* FedEx Pak* FedEx Box FedEx Tube Other

6 Special Handling and Delivery Signature Options

SATURDAY Delivery
NOT available for FedEx Standard Overnight, FedEx 2Day A.M., or FedEx Express Saver.

No Signature Required
Package may be left without obtaining a signature for delivery.

Direct Signature
Someone at recipient's address may sign for delivery. Fee applies.

Indirect Signature
If no one is available at recipient's address, someone at a neighboring address may sign for delivery. For residential deliveries only. Fee applies.

Does this shipment contain dangerous goods?
One box must be checked.

No Yes
As per attached Shipper's Declaration. Yes
Shipper's Declaration not required.

Dry Ice
Dry Ice, 9 UN 1845 _____ x _____ kg

Cargo Aircraft Only

Dangerous goods (including dry ice) cannot be shipped in FedEx packaging or placed in a FedEx Express Drop Box.

7 Payment Bill to: Enter FedEx Acct. No. or Credit Card No. below.
 Sender Acct. No. in Section will be billed. Recipient Third Party Credit Card Cash/Check
FedEx Acct. No. Exp. Date
Credit Card No.

Total Packages 1 Total Weight _____ lbs. Total Declared Value* _____ \$

*Our liability is limited to \$100 unless you declare a higher value. See back for details. By using this Airbill you agree to the service conditions on the back of this Airbill and in the current FedEx Service Guide, including terms that limit our liability. 611
Rev. Date 11/10 • Part #183134 • ©1994-2010 FedEx • PRINTED IN U.S.A. SRS

The FedEx US Airbill has changed. See Section 4.
For shipments over 150 lbs., order the new FedEx Express Freight US Airbill

PULL AND RETAIN THIS COPY BEFORE AFFIXING TO THE PACKAGE. NO POUCH NEEDED.

VACEK & FREED, PLLC

OPERATING ACCOUNT

3/20/2012

Harris County Clerk

Brunsting

10.00

*added
to TS.*

B of A-Operating-2719 Filing Fees

10.00

NK

COURTHOUSE
E
CONNECTION
GREG COX

added to
TS.

REGULAR FILING REQUEST FORM

OFFICE: (713) 228-0502
FAX: (713) 228-0503
PAGER: (713) 765-0505

Date of Request	4/2/12	Person Making Request	Summer
Law Firm	Vacek & Freed	Phone	281-531-5800
CLIENT	Brunsting		

DOCUMENT(S) Elmer H. Brunsting Will
Nelva E. Brunsting Will

STYLE _____

CAUSE # _____ COURT _____

RECEIVED
2012 APR -2 PM 4:30
Stephanie
COUNTY CLERK
HARRIS COUNTY TEXAS

RETURN: This Form Extra Cover Letter Extra Copy of Document Receipt Other
 @ 4/2 No Fee



VACEK & FREED, PLLC

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

emailed 4.12.12

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

04/12/2012

Invoice # 10605

STATEMENT

Previous balance			(\$948.59)
	Professional Services		
03/28/12	Draft e-mail to Client (Co-Trustees) regarding Asset List; finalize Asset List for dual signature and send via e-mail		Summer Peoples
03/29/12	Correspondence via e-mail with Co-Trustees regarding asset information pertaining to date of death values and gifting; revise Asset List; e-mail Co-Trustees same with revisions		Candace Freed
04/02/12	Service Fee for courier delivery of original Wills to court		Summer Peoples
	Copies received from Client via e-mail		Summer Peoples
Total for professional services rendered		0.90	\$212.40
Credit balance			(\$736.19)

Billing Summary

Total for services rendered	\$177.00
Total expenses	\$35.40
Total payments and other transactions	\$0.00
Total previous balance	(\$948.59)
Balance Due Now*	(\$736.19)

**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 002094

Thank you!

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Monday, January 24, 2011 9:23 PM
To: Candace Freed
Subject: RE:

Candace,

Please go ahead and split the stocks 50/50 between the 2 trusts.

Thanks, Anita

-----Original Message-----

From: Candace Freed [mailto:candace@vacek.com]
Sent: Monday, January 24, 2011 2:17 PM
To: Anita Brunsting
Subject: RE:

Basis is determined by the mean (average of the high and the low on the date of death) value of the stock on the date of death. This is why you are a "little off" - the capital gains/losses are calculated based on the mean value of the trade day. Whatever goes in the DT keeps that value as the basis. Your mom gets a step-up/down to the mean value on the stock that is in the ST as long as it was Community Property. Does this help?

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

Vacek & Freed, PLLC
14800 St. Mary's Lane, Suite 230
Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
Email: candace@vacek.com

www.vacek.com

We have moved! Our new office address is as shown above. We are one exit west of our old office building. Exit Dairy Ashford. Turn south on Dairy Ashford. St. Mary's Lane is a side street one block south of I-10 Katy Freeway. Turn west on St. Mary's Lane. Our building is in the northwest corner of the four-way stop.

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-----Original Message-----

From: Anita Brunsting
[mailto:akbrunsting@suddenlink.net]
Sent: Sunday, January 23, 2011 7:41 PM
To: Candace Freed
Subject: RE:

Candace,

How did you get the total stock \$ value? I went back to 4/1/2009 and I got a price per share of 69.23 for Exxon and 68.30 for Chevron. I used the 3/10/2009 quarterly earnings values for the total number of stock shares.

My #'s are just a little off from yours.

Thanks, Anita

-----Original Message-----

From: Candace Freed [mailto:candace@vacek.com]
Sent: Friday, January 21, 2011 12:59 PM
To: Anita Brunsting
Subject: FW:

Here are the revising Funding sheets. Please take a look at these. I am pulling the forms from BNY Melon and Computershare now.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

Vacek & Freed, PLLC
14800 St. Mary's Lane, Suite 230
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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-----Original Message-----

From: RicohMPC6000@vaceklaw.com
[mailto:RicohMPC6000@vaceklaw.com]
Sent: Thursday, January 20, 2011 4:57 PM
To: Candace Freed
Subject:

This E-mail was sent from "RNPD3A570" (MP C6000/LD260c).

Scan Date: 01.20.2011 16:56:42 (-0600)
Queries to: RicohMPC6000@vaceklaw.com

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

14800 St. Mary's Lane, Suite 230
Houston, Texas 77079
(281) 531-5800
1-800-229-3002
Telefax (281) 531-5885
E-mail Address: consult@vacek.com

January 27, 2011

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

Re: The Brunsting Family Living Trust

Dear Ms. Brunsting:

I have enclosed two copies of the engagement letter for the above estate. Please sign both copies, and return the copy marked "law firm copy" to our office in the enclosed envelope.

Feel free to contact our office if you have any questions.

Sincerely,



Summer Peoples, CP
Certified Paralegal

/sp
Enclosures

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

July 27, 2011

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

Re: The Brunsting Family Living Trust, Nelva E. Brunsting Survivor's Trust, and
the Elmer H. Brunsting Decedent's Trust

Dear Ms. Brunsting:

I have enclosed two copies of the engagement letter for the above estate. Please sign both copies, and return the copy marked "law firm copy" to our office in the enclosed envelope along with the prescribed retainer fee.

Feel free to contact our office if you have any questions.

Sincerely,



Summer Peoples, CP
Certified Paralegal

/sp
Enclosures

Candace Freed

From: Candace Freed
Sent: Tuesday, August 16, 2011 1:29 PM
To: 'Anita Brunsting'
Subject: Re: Request for Documents

Anita,

Please confirm how you want the documents to come to you (Snail Mail, CMRRR, or FEDX Economy). Summer can package them up and put prepaid postage on them with the address label as well if desired. Also please confirm the address to send it to: 203 Bloomingdale Circle, Victoria Texas 77904?

We received the engagement letter signed but there was no retainer enclosed. Please advise whether you will be sending the requested retainer.

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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VACEK & FREED, PLLC

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*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

December 8, 2011

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

Ms. Amy Ruth Brunsting, Co-Trustee
2582 Ledge
New Braunfels, TX 78132

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

Dear Brunsting Co-Trustees:

I have enclosed two copies of the engagement letter for the above estate. Please sign both copies, and return the copy marked "law firm copy" to our office in the enclosed envelope along with the prescribed retainer fee.

Feel free to contact our office if you have any questions.

Sincerely,



Summer Peoples, CP
Certified Paralegal

/sp
Enclosures

Candace Freed

From: Candace Freed
Sent: Tuesday, December 20, 2011 3:40 PM
To: 'Anita Brunsting'
Subject: RE: life insurance money

I assumed you were talking about the proceeds payable to and owned by the Brunsting Family Irrevocable Trust and not any simply insuring your mom that were payable to a death beneficiary or to the Living or Survivor's Trust. Correct?

AS far as I know, unless your mom acquired any new policies after Elmer died, that insured her, the only one that I knew of that insured her was a METLIFE accidental death and we were not certain at that time whether the policy was in full force.

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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From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Monday, December 19, 2011 10:59 AM

V&F 002101

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

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Candace Freed

From: Candace Freed
Sent: Tuesday, December 20, 2011 3:34 PM
To: 'Anita Brunsting'
Subject: RE: life insurance money

Yes, there is a reason you cannot. It is because the proceeds are governed by a separate trust under a separate ID. The IRREV Life insurance Trust is governed by a separate Trust Instrument that keeps the proceeds out of your parents estates for estate tax purposes. Do not commingle as the distribution terms of the IRREV Trust differ from the Living Trust (Survivor's and Decedent's) I hope this answers your question.

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
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From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Monday, December 19, 2011 10:59 AM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: life insurance money

V&F 002103

Candace,

Is there any reason that the life insurance money cannot be deposited into the survivor's trust account? This would save us from having to receive and mail big checks. They have the option of setting up a separate checking account through their services, but we'd still have to write a check to each child.

Anita

Summer Peoples

From: Summer Peoples
Sent: 12/28/2011 4:02 PM
To: 'Amy Ruth Brunsting'; 'Anita Kay Brunsting'
Subject: Brunsting Estate
Sensitivity: Confidential
Attachments: Invoice 12.28.11.pdf

Brunsting Co-Trustees:

Attached is a copy of the recent statement associated with this matter. The attached copy is for your records. You may wish to print a copy.

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 Kay Brunsting, Co-Trustee, &
Amy Ruth Brunsting, Co-Trustee
Victoria, TX 77904

12/28/2011

Invoice # 10481

STATEMENT

Previous balance \$631.84
Total payments (\$4,500.00)

Professional Services

- 12/08/11 Telephone call with Co-Trustee for mailing address to add to file Leticia Meador
12/12/11 Correspondence via e-mail with Client regarding home appraisal value and advise Candace Freed
12/20/11 Correspondence via e-mail with Client regarding life insurance proceeds and deposit of same Candace Freed
12/22/11 Data entry of information for Asset List Leticia Meador

Total for professional services rendered 2.40 \$312.00

Credit balance (\$3,556.16)

Billing Summary

Table with 2 columns: Description, Amount. Rows: Total for services rendered (\$312.00), Total expenses (\$0.00), Total payments and other transactions (\$4,500.00), Total previous balance (\$631.84)

Balance Due Now (\$3,556.16)

*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 002106

Thank you!

Candace Freed

From: Anita Brunsting [akbrunsting@suddenlink.net]
Sent: Tuesday, January 03, 2012 3:32 PM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: *** SPAM ***
Attachments: Buick Title.jpg

Importance: Low

Mom never had the names changed.

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

January 5, 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 Brunsting Co-Trustees:

Enclosed are Personal Asset Trust Information Sheets for you and for Carol Ann Brunsting. Please forward an original sheet to Carol for her to complete and return to our office. For your convenience I have enclosed return envelopes for you and Carol. Please note that I need the original sheets returned, so scanned copies are not sufficient.

I mailed a sheet to Amy for her to complete and return as well.

Sincerely,



Summer Peoples, CP
Certified Paralegal

/sp
Enclosures

cc: Ms. Amy Ruth Brunsting, Co-Trustee (w/ encl)
2582 Ledge
New Braunfels, TX 78132

Candace Freed

From: Candace Freed
Sent: Monday, January 09, 2012 12:35 PM
To: 'Anita Brunsting'
Cc: 'Amy Brunsting'
Subject: RE: copy of letter from Candy
Attachments: Distr Ltr.pdf

If they came from the Decedent's Trust funds, there should be no gift tax to file (It is a distribution) and thus no gift tax. If it came from the Survivor's Trust then it was not a distribution it was a gift in which a gift tax return would be required for everything over the \$13,000. If from the Decedent's Trust, it just means that everyone else gets less because the value of the trust is presumably \$40,000.00 less than it would be today, but for the distribution.

Have you asked Carol and Amy if they signed anything? I have attached a copy of what I provided to Ms. Brunsting for those early distributions.

Ms. Brunsting specifically had me prepare these letters and also to amend the trust.

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 002109

From: Anita Brunsting [mailto:akbrunsting@suddenlink.net]
Sent: Tuesday, January 03, 2012 5:28 PM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: RE: copy of letter from Candy

Candace,

Regarding the loans/advances to Candy and Carole in 2010, we can't find any copies of the letters they signed in mom's files, so we'll have to treat it as a gift. We'll get w/ Rich to amend mom's tax return.

Anita

From: Candace Freed [mailto:candace@vacek.com]
Sent: Tuesday, January 03, 2012 2:56 PM
To: Anita Brunsting; Amy Brunsting
Cc: Chip Mathews Gmail
Subject: RE: copy of letter from Candy

Brunsting Co-Trustees (Amy and Anita),

If someone wants to buy out the other 4 beneficiaries on the homestead then it needs to be at fair market value (current). Is there enough in your moms share of the trust do so? It can be combined with the assets from the decedent's Trust. One could trade the farmland in the DT for the house if they wanted as long as the value is current fair market value on each.

Once a person receives their share from the IRREV Life Insurance trust, they may like to use the funds to buy out the other four on the Homestead. It's worth posing the question to each of the beneficiaries. All agreements should be in the form of a family settlement agreement signed by all parties.

If no one is interested in taking the property (homestead) it's cleaner to have the trust sell the property rather than 5 individual trusts since each seller would have to be available for signing or execute a power of attorney to have someone sign as their agent. Furthermore, all five trusts would have to provide their pro-rata share of the maintenance, expenses and taxes and insurance until the time the home is sold.

However, if a family member wants to retain the home in lieu of other assets as their trust share, then it can be done if the trust shares are large enough to accommodate. It was my understanding that based on your moms expenses (both medical and care givers) that her share of the trust was significantly reduced. I'm not sure what the accounts look like on your dads share of the trust as yet.

Although the trust states that you and Amy have discretion as Co-trustees it helps to have all on board and communicate with the beneficiaries especially when it comes to the sentimental things (i.e. family land and personal belongings etc).

Lastly, the Loans (and or notes) from Carol and Candy need to be documented – although they may not have been an advance on their trust shares, they need to be identified as a loan that has not been paid back or your moms accountant will have to file a gift tax return for all over 13K as a gift (if Nelva did not already do so with CPA last year or at the time the loans were made). Need the date of the loans, the amounts and we will calculate the AFR for the interest accrued.

After review of the file, I have not received and still need the following:

1. Edward Jones Date of death statement for the Survivor's Trust by account number
2. Edward Jones end of November stmt for Decedent's Trust

V&F 002110

-
3. All Bank statements for accounts for November 2011 (Bluebonnet and Bank of America)
 4. List of contents in safe deposit box
 5. Value of the farm (Current fair market value)
 6. Value of the house (what is the market price); Actual sales price will determine the market value but the realtor will tell you what he/she would put it on the market at
 7. Copy of last year's tax return (2010)
 8. Copy of the certificate of title (to see if your mom re-certificated after Elmer passed away or whether it still reads Elmer and Nelva.

You may Scan and email or fax is fine if you do not wish to mail them.

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

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Houston, Texas 77079
Phone: 281.531.5800
Toll-Free: 800.229.3002
Fax: 281.531.5885
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From: Anita Brunsting [mailto:akbrunsting@suddenlink.net]
Sent: Saturday, December 31, 2011 12:28 PM
To: Candace Freed; 'Amy Brunsting'
Subject: copy of letter from Candy

I'm attached a letter for a request of documents that Candy sent to me by certified mail. I've already sent her a copy of the trust and the amendments mom made in 8/25/10. I did realize that in the amendments, the specific documentation

V&F 002111

naming Amy and me co-trustees was not included (do I need to send out copies of these?). The only thing included in the amendments that I sent was the part of the documents establishing the personal asset trusts.

Regarding the remainder of what she's asking for or threatening ("court intervention"), Candace, please advise. I have emailed her already, explaining that we're working on a tabulation of the assets. Do we have to notify the beneficiaries of the sale of assets as she attests? The only things we're looking at are the house and mom's car.

Anita

Candace Freed

To: Anita Brunsting
Subject: RE: *** SPAM ***

Sorry. I missed page 2. Looks fine to me. It keeps the beneficiaries informed which is good.

Sincerely,

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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From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Sunday, January 22, 2012 10:33 PM
To: Candace Freed; 'Amy Brunsting'
Subject: *** SPAM ***
Importance: Low

Candace,

V&F 002113

Is the attached accounting sufficient to send out for now to the beneficiaries w/ the explanation that it is not complete?

Anita

Ali Re: Brunsting

Candace Freed

To: Anita Brunsting
Subject: RE: Life Ins Check Receipt Doc (IRREV Trust)

Anita,

Letter looks good. However, I recommend you ask Rich how much to hold back in that account to prepare the final income tax return for the irrevocable trust. It did not equate to much income but he may want to file the final return to close it out. Also, you will need to let each beneficiary know (I suggest in the letter attached) after talking with the CPA that they will/may receive a K1 for the interest to be filed/reported on their individual personal income tax return.

In short,

1. call CPA and ensure whether final income tax return is to be filed for the IRREV Life Insurance Trust based on the income
2. Hold back whatever he tells you it will cost for the final return (if needed); and
3. Ask whether he will issue K-1's. If yes,
4. Revise letter to state as such.

I will answer your other email today. Thanks

Sincerely,

Candace L. Kunz-Freed
Attorney at Law

11777 Katy Freeway, Suite 300 South
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Phone: 281.531.5800
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From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
Sent: Monday, January 23, 2012 6:49 PM
To: Candace Freed
Cc: 'Amy Brunsting'
Subject: Life Ins Check Receipt Doc

Candace,

I received the checkbook w/ the checking acct set up today from the life insurance company. There's \$250,440.00 in the account. Do I need to do a tax return for this trust before I disburse the funds? Also, you said I should include a letter for each beneficiary to sign in return to acknowledge receipt of the check. Please take a look at the attached and let me know if it will do. The \$440 is for interest on the account - I haven't heard anything about them reimbursing the trust for the remainder of the premium for last year - I guess I'll call and check on that.

Thanks,
Anita

Candace Freed

From: akbrunsting@suddenlink.net
Sent: Monday, January 23, 2012 3:50 PM
To: Candace Freed
Cc: Amy Brunsting
Subject: RE: accounting

I put the expenses on page 2 of the file - did you see them - or do I need to reformat them into categories?

Also, does Candy have any validity in her claims about the application of the law in her latest email (30 days to send documents?)

thanks, Anita

---- Candace Freed <candace@vacek.com> wrote:

> Anita and Amy,

>

>

>

> I think this looks pretty good as a preliminary. My guess is that you
> will next be requested to show the liabilities or expenses that have
> been paid since Nelva's date of death. This can be a simple list of
> them and the amounts. May as well put them in there. We are compiling
> the value as of the date of death for you to provide to them (pending
> the farm and the home) so I think the snap shot in time showing the
> 20th of January is a great start.

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> Sincerely,

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> Candace L. Kunz-Freed

>

> Attorney at Law

>

>

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> 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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> From: Anita Brunsting [<mailto:akbrunsting@suddenlink.net>]
> Sent: Sunday, January 22, 2012 10:33 PM
> To: Candace Freed; 'Amy Brunsting'
> Subject: *** SPAM ***
> Importance: Low

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> Candace,
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> Is the attached accounting sufficient to send out for now to the
> beneficiaries w/ the explanation that it is not complete?

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>
> Anita
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Candace Freed

From: akbrunsting@suddenlink.net
Sent: Tuesday, January 24, 2012 10:16 AM
To: Candace Freed
Cc: Amy Brunsting
Subject: RE: requested documents

I have not received the green cards back from either of them, but I checked the receipt #'s online last night, and it showed that Carl's had been delivered, but Candy's had arrived at her local post office but no more information was available - I talked to a post office clerk this morning, and she said (regarding Candy's) that it meant that it hadn't been pick up yet - I'm not sure why I haven't received that returned package yet tho'

But based on Candy's letters, it seems that she has the copy - so I don't know if the PO is wrong - the clerk seemed to say that that was very likely.

I sent her the life insurance trust and mom and dad's death certificates by certified mail today.

Anita

----- Candace Freed <candace@vacek.com> wrote:

> Anita,

>

> Good Response. Have you received the green card back for the certified mail?

>

> Candace

>

>

>

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>

> -----Original Message-----

> From: akbrunsting@suddenlink.net [mailto:akbrunsting@suddenlink.net]

> Sent: Monday, January 23, 2012 3:47 PM

> To: Carl and Drina Brunsting; Carole Brunsting; Candace Curtis

> Cc: al@vasek.com; Amy Brunsting; Candace Freed

> Subject: Re: requested documents

>

> More printed documents are in the mail, this is just what I had in a scanned format. I sent the amended trust and the most recent trust amendments to you and Carl by certified mail on Dec. 21, 2011. I delivered the documents by hand to Amy and Carole.

>

>

> Anita

>

> ----- Candace Curtis <occurtis@sbcglobal.net> wrote:

> > Dear Anita,

> >

> >

> > If you think that sending me incomplete or inaccurate records in

> > this piecemeal fashion somehow satisfies my demands for production,

> > or your legal obligation to produce said records, you should

> > probably read the Texas statutes and your trustee handbook, where

> > you will find that your first obligation as an alleged trustee is

> > full and complete disclosure. Your piecemeal dissemination is

> > merely evidence of your refusal or otherwise failure to meet your

> > obligations. This is known in the law of trusts as BREACH. The

> > more information I get, the less I am convinced that you have ANY authority to act as a trustee. You might want to check on how and when powers of attorney terminate.

> > Further, any intended action which may affect the interest of any beneficiary, requires written notice, by certified mail, no less than 30 days prior to any such action. You are required by law to notify ALL named trustees and successor trustees, and ALL beneficiaries and successor beneficiaries, in writing, by certified mail. You have failed to do so, over and over and over again, which means that NONE of your actions are valid.

> > ~~If you intend to act on the basis of your alleged appointment, which~~
> > no one forced you to accept, then you should probably apprise yourself of the law regarding your LEGAL OBLIGATIONS. Secondly, if you intend to act in any way whatsoever, you should probably be absolutely certain that your actions are lawful. It's too bad you didn't get a second opinion, or at least had an attorney who read her partner's "in terrorem" article before thinking you could exacerbate exculpatory or no-contest clauses in your fake ass qualified beneficiary designation. All those fatuous exacerbations are just further evidence of your moral turpitude, misfeasance and mal intent.

> > I could be mistaken, but with your refusal to provide full and complete disclosure, rather just doling out the documents in bits and pieces as you see fit, would appear to compel a presumption of impropriety as a matter of law.

> > It's called extrinsic fraud.

> > Oh, and one more thing regarding your fake ass qualified beneficiary designation. If you intend to act on that document's alleged grant of authority and you think you are prepared to litigate the question of its validity, you should probably try to figure out what EACH paragraph means and how in the world ANYONE could have explained that to our Mother. You assert that Mother signed those documents making those changes, knowing full well what she was signing.

> > I, however, upon receipt of your initial piecemeal documents, contacted Mother by telephone and she assured me in no uncertain terms that she did no such thing. Better yet, she followed it with a written communication reciting our conversation and saying very clearly "that is not true". Disclaiming will not cure the past.

> > I have not bothered to consult with or retain counsel because I CAN READ AND COMPREHEND THE LAW. I have over 30 years of experience in contracts, accounting, and business management for multi-million dollar corporations. I am familiar with trust law because as a property manager all properties were managed under trusts. I am VERY FAMILIAR with NOTICE and accounting requirements.

> > How you managed to obtain a PhD without the ability to read and comprehend is a mystery to me. If you understood trust law AT ALL your disrespectful conduct and power arrogance would be VERY different or nonexistent. I guess that why it is said that those that cannot do, TEACH.

> > As it regards your actual trustee delegation, you are and have
> > always been the sole trustee for the last-to-die life insurance
> > policy. Daddy told me that the purpose of that policy was so that
> > we would all have means pending the trust administration and final
> > distribution, if any. You have failed to communicate any quality
> > information about the proceeds of that policy. It has been 85 days
> > since Mother's death and the majority of life insurance companies
> > settle such claims within the first 90 days. I can envision no
> > complications as it was not an accidental or other limited policy.
> > So, WHERE IS MY MONEY? I have several emails from you over the
> > years asking me to sign blank forms regarding the insurance. I have
> > always asked for copies of the life insurance trust document so that
> > I would know what it was I was waiving. You have consistently refused or otherwise
failed to provide this to me, as you are obliged to do by your own voluntary acceptance of
the fiduciary obligation.

> >
> >
> > And just one last item. You received a written demand for disclosure
> > of the identity of the trust protector or the special co-trustee(s)
> > if any. Your lack of disclosure of this basic information, or any
> > expression of good faith, leaves me with concerns that there is
> > something you fear or want to conceal, but don't worry, what ever it is, we'll get to the
bottom of it.

> >
> > Sincerely,
> >
> > Candy

> >
> > _____
> > From: Anita Brunsting <akbrunsting@suddenlink.net>
> > To: Candace Curtis <occurtis@sbcglobal.net>
> > Cc: Candace Freed <candace@vacek.com>; Amy Brunsting
> > <at.home3@yahoo.com>
> > Sent: Sun, January 22, 2012 9:02:11 PM
> > Subject: requested documents

> >
> > Dear Candy,
> >
> > Attached please find the appointment of successor trustees dated
> > 12/21/10 and mother's will.
> >
> > Anita

Candace Freed

From: akbrunsting@suddenlink.net
Sent: Tuesday, January 24, 2012 10:22 AM
To: Candace Freed
Cc: Amy Brunsting
Subject: RE: Preliminary Accounting

Is there anything in Candy's latest email (yesterday) that I need to respond to? Her claim that I must respond in 30 days, and telling her who the trustor is, among others.

Anita

----- Candace Freed <candace@vacek.com> wrote:

> Sorry, I missed page 2. Looks fine to me. It keeps the beneficiaries
> informed which is good. It's a preliminary accounting. This is all you
> can do at this point until the final numbers are had on the real
> estate for current values.

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> Sincerely,

>
>
>
> Candace L. Kunz-Freed

> Attorney at Law

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>
>
> 11777 Katy Freeway, Suite 300 South

>
> Houston, Texas 77079

> Phone: 281.531.5800

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> Sent: Sunday, January 22, 2012 10:33 PM
> To: Candace Freed; 'Amy Brunsting'
> Subject: *** SPAM ***
> Importance: Low

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