

EXHIBIT U

08/11/2015:1020:PO217

PM TRUST REVIEW MEETING

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

Client Name: Brunsting, Nelva

Date: 07/30/10 Estate Size: 2 mil±

IRA: Husband - N/A Wife - _____

Current Address/Phone: 13630 Pinelock Hwy TX 77079

Date of Trust/Restatement: _____ Previous Amendments? Yes.

Subtrust Funding Done previously? Yes. DT & ST.

AMENDMENT: QBD(PAT) Other Instr Ltr HCPOA

ApptSUCCTee/HIPAA EXTPOA COT POA DIR

Anita Kay Riley & Arny Ruth... Co-tees
or Successors of them. Then Trust

Distribution Change (QBD):

PAT QBD

IF PAT QBD then:

Each beneficiary Trustee of Own Trust: yes no

except for Carl, Anita & Arnie as Co-tees for Carl
(except they have it to name, Carl as owner)
Distribution of PAT: need to Low Succ Tee

Same as LT except need language
about the last amend (QBD) less early distrs.



Notes/History

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

Date Range - All Dates

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



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



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



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



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



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



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



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



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



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

Notes

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



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



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

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

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

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

V&F 001194



Notes/History

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10/7/2010

12:28 PM

Call Completed

Candace Freed



Notes/History

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



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

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

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

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

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

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

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



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10/11/2010

2:30 PM

Call Completed

Candace Freed



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



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



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

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

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

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

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

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

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



Notes/History

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10/25/2010

10:21 PM

Call Completed

Candace Freed



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Houston, TX 77079

Date Range - All Dates

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

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

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



Notes/History

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

Date Range - All Dates

11/18/2010

8:08 AM

E-mail sent

Email to all Brunsting Sibs re: Moms DOC Visit

Candace Freed

From: Candace Freed

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

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

Subject: Nelva Brunsting

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

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

Very truly Yours,

Candace L. Kunz-Freed
Attorney at Law



Notes/History

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

Date Range - All Dates

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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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

V&F 002182



Notes/History

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

Date Range - All Dates

Date	Time	Event	Description	Contact
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/emailed	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

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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

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 srvc. 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

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3/17/2011	10:25 AM	Email rec'd	Amy Ruth Tschirhart name change 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	Summer Peoples
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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 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 think 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	Susan Vacek
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V&F 002178



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 beneficiary during her 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

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 for 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
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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

7/25/2011

4:12 PM

Call Completed

Candace Freed



Notes/History

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

Date Range - All Dates

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

11/14/2011	9:41 AM	Field Changed	Field changed Field E-mail Lst 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

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

11/22/2011

10:00 AM

Meeting Held

Candace Freed



Notes/History

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

Date Range - All Dates

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 appraisal 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 I 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

Contact Elmer H. Brunsting Elmer H. Brunsting

Histories

Date	Time	Result	Regarding & Details	Record Manager
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 requested 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/mailed	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

Specific Distribution:

Ultimate Distribution:

HEALTH CARE DOCUMENTS:

1st Agent: Carol

2nd Agent: Anita

3rd Agent: Amy

IRA TRUST: yes no For whom? husband wife

Trustees upon disability of Trustor or spouse: _____

Each beneficiary Trustee of own trust? yes no

SS# of Surviving Spouse/Beneficiaries: _____

FUNDING:

Real Estate _____

Which property has NO MORTGAGE? _____

_____ Recording HS Deed

_____ Apply for HS Exemption

Tax-deferred Assets _____

_____ Bank & Brokerage Accounts

_____ Safe Deposit Box

_____ Life Insurance

_____ Stocks and Bonds

_____ Oil & Gas Interests

_____ Motor Vehicles

_____ Credit Union Accounts

_____ Sole Proprietorship Assets

_____ Partnership Interests

_____ Promissory Notes & Mortgages

_____ CDs

_____ Annuities

Additional Documents: _____

NOTES:

Needs new DFPDA order

Anita

Carol

Amy

Any Name Changes for children? _____ Any children Predecease? No.

If Yes, who: _____

09112015:1020:P0220

FEES:

QUOTED: \$ _____ (Plus Expenses)

AMOUNT REC'D: None DATE: _____

BALANCE DUE: _____

DOCUBANK? _____

Cost per QBD 1200.

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

Courtesy discount \$150.-

Cy

08/12/2015: 1020: P0221

Anita - called
Carl has encephlytus
amendments to trust

Anita & Annice as Co.tees

change list under ME

Carol
Anita
Annice

financial P.O.A

Anita
Carol
Annice

Amend to trust / PAT's w/ ^{Anita} amend
to connect Supp Needs to ^{to} be
Co.tees.
sp needs?

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

Candace,

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

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

Thanks,
Anita

08/11/2015 10:20: P0222

V&F 001277