



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

Joseph D. Weiler, Jr., Attorney
Ramon F. Rolf, Jr., Attorney
Chrysa M. Milholland, Attorney
Chiara King, Attorney

March 27, 2023

Midland Probate Court
Courthouse
301 W. Main St.
Midland MI 48640

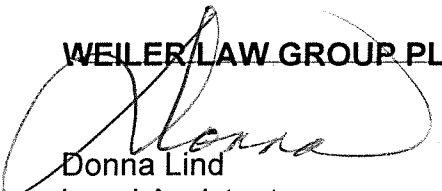
Re: Anne Wolfe Trust matter
21-1959-TV

Dear Register:

Enclosed for filing please find:

- Petition to Allow 6th Annual Account with accounting attached
- Notice of Hearing
- Proof of Service
- \$20

WEILER LAW GROUP PLC


Donna Lind
Legal Assistant
Enclosures

c: Geoffrey E. Malicoat
George R. Phillips
Alan Wolfe
Joel Wolfe

STATE OF MICHIGAN PROBATE COURT COUNTY OF MIDLAND	PROOF OF SERVICE	FILE NO. 21-1959-TV
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In the matter of Anne R. Wolfe

1. Titles of the papers served or mailed: PETITION TO ALLOW 6TH ANNUAL ACCOUNT WITH ACCOUNTING ATTACHED; NOTICE OF HEARING

2. According to court rule, I served by first-class mail registered mail (copy of return receipt attached) certified mail (copy of return receipt attached) the papers described above on:

Name	Complete address of service	Date
Geoffrey E. Malicoat, attorney at law	2707 Ashman Street Midland, MI 48640 And email	3-27-2023
George R. Phillips, attorney at law	603 S. Euclid Avenue Bay City, MI 48706 And email	3-27-2023
Alan Wolfe	912 Cole St. #179 San Francisco, CA 94117	3-27-2023
Joel Wolfe	6645 Forest Beach Drive Holland, MI 49423	3-27-2023

3. According to court rule, I served by **personal service** the papers described above on:

Name	Complete address of service	Date and Time

4. After diligent search and inquiry, I have been unable to find and serve the following interested persons. I have served these persons by publication. Attached are copies of form PC 617.

I declare under the penalties of perjury that this proof of service has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Service fee \$	Miles traveled	Fee \$	
Incorrect address fee \$	Miles traveled	Fee \$	TOTAL FEE \$

3-27-2023
Date

Signature

Donna Lind, Weiler Law Group PLC
Name (type or print)

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT COUNTY OF MIDLAND	NOTICE OF HEARING	FILE NO. 21-1959-TV
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In the matter of Anne R. Wolfe
First, middle, and last name

TAKE NOTICE: A hearing will be held on APRIL 18, 2023 at 11:00 a.m.,
Date Time
 at 301 West Main Street, Midland, Michigan 48640 before Judge Dorene S. Allen P32468
Location Bar no.
 for the following purpose(s): (state the nature of the hearing)

PETITION TO ALLOW 6TH ANNUAL ACCOUNT

If you require special accommodations to use the court because of a disability, or if you require a foreign language interpreter to help you fully participate in court proceedings, please contact the court immediately to make arrangements.

<u>Weiler Law Group PLC</u> <u>Joseph D. Weiler Jr.</u> <small>Attorney name</small>	<u>P71912</u> <small>Bar no.</small>	<u>March 22, 2023</u> <small>Date</small> <u>Christopher L. Wolfe and Cynthia S. Wolfe</u> <small>Petitioner name</small>
<u>5820 Eastman Avenue</u> <small>Address</small>		<u>3220 Sunset Beach Drive NW</u> <small>Address</small>
<u>Midland MI 48640</u> <small>City, state, zip</small>	<u>(989) 492-0955</u> <small>Telephone no.</small>	<u>Olympia Washington 98502-3530</u> <u>(360) 866-9027</u> <small>City, state, zip</small> <small>Telephone no.</small>

USE NOTE TO COURT: If this hearing is for a guardianship matter involving an Indian child as defined in MCR 3.002(12), you must comply with MCR 5.109(2).

USE NOTE: If this form is being filed in the circuit court family division, please enter the court name and county in the upper left-hand corner of the form.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT MIDLAND COUNTY	PETITION TO ALLOW ACCOUNT(S)	FILE NO. 21-1959-TV
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In the matter of Anne R. Wolfe

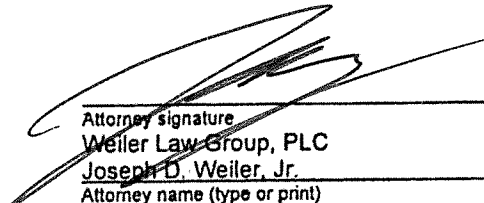
- One or more accounts listing all income and other receipts and expenses and other disbursements, which have come to my knowledge during the accounting period(s), have been filed with the court.
- The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (for each person whose address changed, list the name and new address; attach separate sheet if necessary)

- The attached accounts include:
 - a. fiduciary fees and expenses in the amount of \$ _____.
 - b. attorney fees and costs in the amount of \$ 70,117.71.

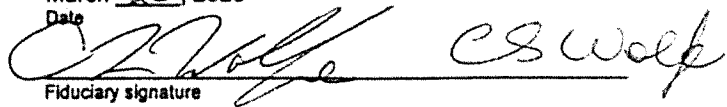
I REQUEST:

- The court approve my fees and expenses and attorney fees and costs in the amount(s) stated above as set forth in the itemized statements attached to the account.
- That the account(s) be allowed as my
 - interim account.
 - 6th _____ account(s).
specify whether 1st, 2nd, 3rd, annual, or final
- That I be discharged. That bond be canceled.
 That the estate be _____ continued. closed.

I declare under the penalties of perjury that this petition has been examined by me and that its contents are true to the best of my information, knowledge, and belief.



 Attorney signature
 Weiler Law Group, PLC
 Joseph D. Weiler, Jr. P71912
 Attorney name (type or print) Bar no.
 5820 Eastman Avenue
 Address
 Midland MI 48640 (989) 492-0955
 City, state, zip Telephone no.

March 20, 2023
 Date


 Fiduciary signature
 Christopher L. Wolfe and Cynthia S. Wolfe
 Fiduciary name (type or print)
 3220 Sunset Beach Drive NW
 Address
 Olympia WA 98502 (360) 866-9027
 City, state, zip Telephone no.

Do not write below this line - For court use only

STATE OF MICHIGAN PROBATE COURT MIDLAND COUNTY	ACCOUNT OF FIDUCIARY, LONG FORM <input checked="" type="checkbox"/> 6th Annual <input type="checkbox"/> Final <input type="checkbox"/> Interim <small>Number</small> <input type="checkbox"/> AMENDED	CASE NO. and JUDGE 21-1959-TV Dorene S. Allen
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Court address 301 W. Main Street B, Midland, Michigan 48640	Court telephone no. (989) 832-6880
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In the matter of Anne R. Wolfe
First, middle, and last name

In a guardianship or conservatorship, the ward's or protected individual's current address and telephone number are:
5109 Grandview Circle, Midland, Michigan 48640 (989) 835-1105

1. I, Christopher L. Wolfe and Cynthia S. Wolfe, am the Co-Trustees
Name Title
 of the estate and submit the following as my account, which covers the period from 01/01/2022
Month, day, year
 to 12/31/2022 (may not exceed 12 months).
Month, day, year

2. SUMMARY

Balance on hand from last account, or value of inventory if first account.....	\$ 1,421,462.94
Add income in this accounting period (Total from Schedule A.).....	\$ 44,110.08
Total assets accounted for.....	\$ 1,465,573.02
Subtract disbursements in this accounting period (Total from Schedule B.).....	\$ (211,939.65)
Total balance of assets remaining (Itemize and describe in Schedule D.).....	\$ 1,253,633.37

Note: Do not provide financial account numbers on this form. If an account number is necessary to distinguish between accounts, put it on form MC 97. If additional sheets are required for Schedule A or B, place all itemization on those sheets and include only category totals on the schedule below.

SCHEDULE A: Income and gain in this accounting period		SCHEDULE B: Expenses, losses, and other disbursements, including distributions to devisees and beneficiaries	
Dividends - Baird	35,533.58	Clothing	58.25
Interest Baird	176.50	Condo Association Fees	3,000.00
Property SEV value increase	8,400.00	Cynthia Wolfe - Reimbursement	8,182.14
		Dental Expense	308.00
		Home Maintenance	178.00
		Legal Fee - C&T	70,117.71
		Mailing	131.92
		Newspaper	442.00
		State Farm - Auto Insurance	889.60
		State Farm - Condo Insurance	165.00
		State of Michigan	150.00
		Summer Property Taxes	1,694.56
		Winter Property Taxes	435.77
		Yeo and Yeo	1,055.00
		Change in value of securities	124,960.03
		Foreign Taxes Paid	171.67
Investment gain		Investment loss	
Disposition gain, if any, from Schedule C		You must enter a number here, even if it is "0"	
		Disposition loss, if any, from Schedule C	

Total Income and Gain	35,710.08	Total Expense, Loss, and Disbursement	211,939.65
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SCHEDULE C: Gain and loss on disposition of assets (Use only if needed.)					
DESCRIPTION	DATE ACQUIRED	DATE SOLD/ DISPOSED	VALUE AT TIME ACQUIRED BY FIDUCIARY	PROCEEDS OF SALE/ DISPOSITION	GAIN (LOSS)
TOTAL GAIN (LOSS)			0.00	0.00	
If gain, transfer to Schedule A; if loss, transfer to Schedule B.					

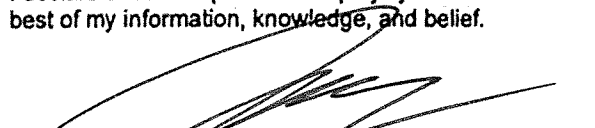
SCHEDULE D: Itemized assets remaining at end of accounting period	
If additional sheets are required, indicate on Schedule "See attached sheets."	
Baird - Account Number 7806-7629	1,112,210.37
Condominium: 5109 Grandview Circle, Midland MI value based on 202 ² SEV of \$ 59,600	119,200.00
Car	22,223.00
BALANCE OF ASSETS REMAINING (Show this amount on summary.)	1,253,633.37

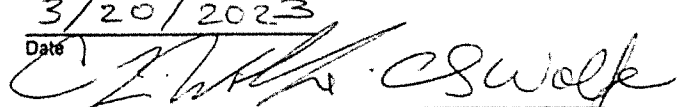
NOTE: In guardianships and conservatorships, except as provided by MCR 5.409(C)(4), you must present to the court copies of corresponding financial institution statements or you must file with the court a verification of funds on deposit, either of which must reflect the value of all liquid assets held by a financial institution dated within 30 days after the end of the accounting period.

3. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)

4. This account lists all income and other receipts and expenses and other disbursements that have come to my knowledge.
5. This account is not being filed with the court.
6. My fiduciary fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$_____. Attached is a written description of the services performed.
7. Attorney fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$70,117.71. Attached is a written description of the services performed.

I declare under the penalties of perjury that this account has been examined by me and that its contents are true to the best of my information, knowledge, and belief.


 Attorney signature
 Weiler Law Group, PLC
 Joseph D. Weiler, Jr. P71912
 Attorney name (type or print) Bar no.
 5820 Eastman Avenue
 Address
 Midland, MI 48640 (989) 492-0955
 City, state, zip Telephone no.

3/20/2023
 Date

 Fiduciary signature
 Christopher L. Wolfe and Cynthia S. Wolfe
 Fiduciary name (type or print)
 3220 Sunset Beach Drive NW
 Address
 Olympia, WA 98502 (360) 866-9027
 City, state, zip Telephone no.

(For accounts that must be filed with the court.)

NOTICE TO INTERESTED PERSONS

1. You must bring to the court's attention any objection you have to this account. Except in guardianships and conservatorships, the court does not normally review the account without an objection.
2. You have the right to review proofs of income and disbursements at a time reasonably convenient to the fiduciary and yourself.
3. You may object to all or part of an accounting by filing a written objection with the court before the court allows the account. You must pay a \$20.00 filing fee to the court when you file the objection. (See MCR 5.310[C].)
4. If an objection is filed and is not otherwise resolved, the court will conduct a hearing on the objection.
5. You must serve the objection on the fiduciary or his/her attorney.

5109 GRANDVIEW CIR MIDLAND, MI 48640 (Property Address)

Parcel Number: 14-04-50-246



Item 1 of 3 2 Images / 1 Sketch

Property Owner: WOLFE, ANNE R TRUST

Summary Information

> Residential Building Summary

- Year Built: 1982
- Full Baths: 2
- Sq. Feet: 1,536
- Bedrooms: 3
- Half Baths: 1
- Acres: N/A

- > Assessed Value: \$59,600 | Taxable Value: \$53,900
- > Property Tax information found

Owner and Taxpayer Information

Owner

WOLFE, ANNE R TRUST
CYNTHIA WOLFE
3220 SUNSET BEACH DR NW
OLYMPIA, WA 98502

Taxpayer

SEE OWNER INFORMATION

General Information for Tax Year 2022

Property Class	401 RESIDENTIAL-IMPROVED	Unit	180 CITY OF MIDLAND - MIDLAND
School District	MIDLAND PUBLIC SCHOOLS	Assessed Value	\$59,600
MAP #	No Data to Display	Taxable Value	\$53,900
USER NUM IDX	0	State Equalized Value	\$59,600
USER ALPHA 1	Not Available	Date of Last Name Change	Not Available
USER ALPHA 3	Not Available	Notes	Not Available
Historical District	No	Census Block Group	No Data to Display
USER ALPHA 2	Not Available	Exemption	No Data to Display

Principal Residence Exemption Information

Homestead Date 02/19/2002

Principal Residence Exemption	June 1st	Final
2022	100.0000 %	100.0000 %

Previous Year Information

Year	MBOR Assessed	Final SEV	Final Taxable
2021	\$55,400	\$55,400	\$52,179
2020	\$53,000	\$53,000	\$51,459
2019	\$50,500	\$50,500	\$50,500
2018	\$52,200	\$52,200	\$52,200
2017	\$52,700	\$52,700	\$51,613
2016	\$52,000	\$52,000	\$51,153
2015	\$51,000	\$51,000	\$51,000
2014	\$56,100	\$56,100	\$56,100
2013	\$55,800	\$55,800	\$55,800
2012	\$55,800	\$55,800	\$55,800
2011	\$55,800	\$55,800	\$55,800
2010	\$55,800	\$55,800	\$55,800
2009	\$58,100	\$58,100	\$58,100
2008	\$59,300	\$59,300	\$59,300

PREMIER CLIENT STATEMENT

ACCOUNT SUMMARY

	This Period December 1, 2022	Year-to-Date January 1, 2022
Beginning Balance	\$1,144,471.73	\$1,288,439.94
Cash Deposits		
Cash Withdrawals	-10,148.75	-86,807.95
Income and Distributions	5,419.43	35,710.08
Other Transactions	-42.00	-171.67
Change in Value*	-27,490.04	-124,960.03
Total Assets:		
December 31, 2022	\$1,112,210.37	\$1,112,210.37

* Change in Value may include assets received in and/or delivered out.

INVESTMENT OBJECTIVE

Capital Growth

If you have any questions concerning your investment objective, or wish to make a change, please contact your Baird Financial Advisor.

ASSET ALLOCATION

Baird is pleased to present your 2022 Annual Client Statement. While this statement may facilitate tax preparation, you will still be receiving a separate tax reporting document, if applicable, with information that is reportable to the Internal Revenue Service.

The "This Period" columns on this statement represent activity in your account from December 1, 2022 through December 31, 2022, while the "Year-to-Date" columns represent activity in your account for the entire year. If you have questions regarding your statement, please contact your Baird Financial Advisor.

Robert W. Baird & Co. Incorporated
777 East Wisconsin Avenue Milwaukee, WI 53202-5391

Member NYSE, Inc. and other principal exchanges. Member SIPC.

www.rwbaird.com

Delivery Preference: Electronic

Statement Period: **JANUARY 1 - DECEMBER 31, 2022**
Account Number: [REDACTED]
Account Solution: **Brokerage**
For more information, go to www.bairdwealth.com/retailinvestor



**CHRISTOPHER L WOLFE &
CYNTHIA S WOLFE TTEES
ANNE R WOLFE DISCRETIONARY TR
U/A DTD 02/15/02
3220 SUNSET BEACH DR NW
OLYMPIA WA 98502-3530**

YOUR BAIRD FINANCIAL ADVISOR

**The Porath Howard White Debeau Office Servicing Your Account
Group**

Telephone: (800) 276-0271 3320 Ridgcrest Drive Ste 100
Midland MI 48642

A Message from Baird

More than just investment advice, wealth management at Baird is about your big picture – identifying what's most important to you and building a plan that delivers on those priorities. No matter where you are now and where you'd like to go, your Baird Financial Advisor team will always be there helping you make smart plans for your future.

Portfolio Bulletin Board

Contact your Baird Financial Advisor if you are interested in investment alternatives.

Account Protection

Assets in your Baird account are protected by SIPC, subject to applicable limits. Baird provides additional coverage in excess of SIPC limits through an insurance policy with Lloyd's of London. Your balances in the bank deposit account are insured by the FDIC subject to applicable limits. For more information on FDIC insurance, please see rwbaird.com/cashsweeps.

THE OFFICE OF
GEORGE R. PHILLIPS
ATTORNEY AT LAW
603 S. EUCLID AVENUE
BAY CITY, MICHIGAN 48706

George R. Phillips
George R. Phillips, III

PHONE: (989) 686-4100

george.phillips.law@gmail.com
Fax (989) 686-4700

October 5, 2022

By email to: weiler@weilerlawgroup.com

Trust for the Benefit of Anne R. Wolfe
c/o Weiler Law Group. PLC
5820 Eastman Avenue
Midland, MI 48640

RE: Statement for Attorney Services Rendered

This letter constitutes my bill for attorney services rendered on Anne's behalf from March 1, 2022 to October 5, 2022. An itemization of services is enclosed.

ATTORNEY FEES:	\$15,275.00
LESS: Discount	(3,055.00)
COSTS: Copies and postage	<u>11.25</u>
TOTAL BALANCE DUE:	\$12,231.25

Very truly yours,

George R. Phillips

GRP/sa

Encl.

cc: Anne Wolfe w/ encl. (by email to: wolferanne@gmail.com)

(CTH)

SMITH & BROOKER, P.C.

Attorneys and Counselors
703 Washington Avenue
Bay City, Michigan 48708

October 14, 2022

Statement of Account

Mr. Joseph D. Weiler, Jr.
Weiler Law Group, PLC
5820 Eastman Avenue
Midland, MI 48640

Re: Wolfe mediation

<u>LEGAL SERVICES RENDERED</u>	<u>HOURS</u>
9/21/2022 Review summaries; Preparation for mediation	.50
9/22/2022 Attend Mediation	4.50
9/23/2022 Work on stipulated agreement; Attention to CPI/SNT	.40
9/26/2022 Revise settlement draft; Correspondence to Attys. Malicoat & Weiler	.40
10/13/2022 Attend Mediation at Atty. Weiler's office in Midland	<u>3.00</u>
Total Legal Services Rendered:	8.80
8.80 hours at \$225 per hour	
<u>TOTAL AMOUNT DUE SMITH & BROOKER, P.C.</u>	<u>\$1,980.00</u>

Chalgian & Tripp Law Offices, PLLC

5820 Eastman Avenue
Midland, MI 48640
989-423-1200

February 1, 2022

Invoice submitted to:
Anne Wolfe Trust Administration
c/o Christopher L. Wolfe
3220 Sunset Beach Drive, NW
Olympia, WA 98502

Invoice # 197996
Billing Attorney: JDW

Professional Services

			<u>Hours</u>	<u>Amount</u>
12/23/2021	JDW	Review pleadings; telephone conf with opposing counsel	1.50	487.50
12/27/2021	DJL	Telephone call with court; work on file	0.40	70.00
12/29/2021	JDW	Review MTC and EPIC re pleadings	1.00	325.00
1/3/2022	JDW	Telephone conf with client	0.50	162.50
1/4/2022	JDW	Correspondence with opposing counsel	0.80	260.00
1/5/2022	JDW	Communicate with opposing counsel	0.50	162.50
1/10/2022	JDW	Telephone call with client	0.50	162.50
1/13/2022	JDW	Telephone conf with opposing counsel	0.50	162.50
1/17/2022	JDW	Review correspondence	0.50	162.50
1/19/2022	JDW	Telephone conf with client	0.50	162.50
1/21/2022	JDW	Continue to work on file	0.50	162.50
1/25/2022	JDW	Review file and prepare for family meeting; telephone conf with clients	1.50	487.50
	JDW	Conduct family meeting; make notes to file re same	1.50	487.50
1/26/2022	JDW	Telephone conf with opposing counsel	0.50	162.50
	JDW	Review correspondence	0.50	162.50
		Subtotal of charges		<u>\$3,580.00</u>
		For professional services rendered	11.20	<u>\$3,580.00</u>

	<u>Amount</u>
Balance due	<u>\$3,580.00</u>

Payment Due: February 28, 2022. Thank you.

You may now pay your invoice by credit card. We accept Visa, MasterCard, and Discover. To make a payment by credit card, please go to www.mielderlaw.com/payment.

Chalgian & Tripp Law Offices, PLLC

1019 Trowbridge Road
East Lansing, MI 48823
517-332-3800

March 1, 2022

Invoice submitted to:
Anne Wolfe Trust Administration
c/o Christopher L. Wolfe
3220 Sunset Beach Drive, NW
Olympia, WA 98502

Invoice # 201693
Billing Attorney: JDW

Professional Services

			<u>Hours</u>	<u>Amount</u>
1/31/2022	JDW	Telephone call with client	0.50	162.50
	JDW	Review file notes and correspondence with opposing counsel	0.80	260.00
2/1/2022	JDW	Continue to work on file	0.80	260.00
2/2/2022	JDW	Review pleadings; review mediation strategy; telephone conf with client	1.00	325.00
2/3/2022	JDW	Review meeting notes	0.50	162.50
2/4/2022	JDW	Telephone conf with opposing counsel; review pleadings and file notes	1.00	325.00
2/7/2022	JDW	Conf with opposing counsel; review multiple communications	1.00	325.00
2/9/2022	JDW	Correspondence with opposing counsel	0.50	162.50
2/10/2022	JDW	Telephone conf with opposing counsel	0.50	162.50
2/11/2022	JDW	Review pleadings	0.80	260.00
		Subtotal of charges		<u>\$2,405.00</u>
		For professional services rendered	7.40	\$2,405.00
		Previous balance		\$3,580.00
		Accounts receivable transactions		
2/18/2022		Payment - Thank You - Credit Card		<u>(\$3,580.00)</u>
		Total		<u>(\$3,580.00)</u>
		Balance due		<u><u>\$2,405.00</u></u>

Payment Due: March 31, 2022. Thank you.

You may now pay your invoice by credit card. We accept Visa, MasterCard, and Discover. To make a payment by credit card, please go to www.mielderlaw.com/payment.

Chalgian & Tripp Law Offices, PLLC

1019 Trowbridge Road
East Lansing, MI 48823
517-332-3800

Invoice submitted to:
Anne Wolfe Trust Administration
c/o Christopher L. Wolfe
3220 Sunset Beach Drive, NW
Olympia, WA 98502

April 1, 2022

Invoice # 203776

Billing Attorney: JDW

	<u>Amount</u>
Previous balance	\$2,405.00
Accounts receivable transactions	
3/25/2022 Payment - Thank You - CheckNo. 2068	<u>(\$2,405.00)</u>
Total	<u>(\$2,405.00)</u>
Balance due	<u><u>\$0.00</u></u>

Payment Due: April 30, 2022. Thank you.

You may now pay your invoice by credit card. We accept Visa, MasterCard, and Discover. To make a payment by credit card, please go to www.mielderlaw.com/payment.



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 84
Date: 03/29/2022
Due On: 04/29/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	03/01/2022	Continue to work on file	0.75	\$325.00	\$243.75
Service	03/01/2022	Telephone call with client	0.50	\$325.00	\$162.50
Service	03/04/2022	Telephone conf with opposing counsel; review pleadings	1.00	\$325.00	\$325.00
Service	03/07/2022	Extensive telephone conf with attorney George Phillips	0.75	\$325.00	\$243.75
Service	03/08/2022	Telephone conf with client; telephone conf with opposing counsel; review file materials	0.75	\$325.00	\$243.75
Service	03/17/2022	Telephone conf with opposing counsel	0.50	\$325.00	\$162.50
Service	03/17/2022	Review pleadings and research re same	0.75	\$325.00	\$243.75
Service	03/18/2022	Continue to work on file	0.75	\$325.00	\$243.75
Service	03/21/2022	Continue to work on file; focus on hearing and responding to opposing counsel	1.00	\$325.00	\$325.00
Service	03/21/2022	Telephone conf with attorney G. Phillips	0.50	\$325.00	\$162.50
Service	03/21/2022	Review file in advance of phone conf with George	0.50	\$325.00	\$162.50
Service	03/22/2022	Continue to work on file	0.50	\$325.00	\$162.50
Service	03/23/2022	Discuss file with attorney George Phillips	0.50	\$325.00	\$162.50
Service	03/24/2022	Telephone conf with Cynthia	0.50	\$325.00	\$162.50

Service	03/24/2022	Telephone conf with attorney Phillips; review file notes	0.50	\$325.00	\$162.50
Service	03/25/2022	Review proposed order	0.75	\$325.00	\$243.75
Service	03/28/2022	Telephone call with client	0.50	\$325.00	\$162.50
Service	03/28/2022	Prepare for Hearing	0.75	\$325.00	\$243.75
Service	03/28/2022	Telephone conf with client	0.50	\$325.00	\$162.50
Service	03/28/2022	Work on accounting	1.00	\$325.00	\$325.00
				Subtotal	\$4,306.25
				Admin Fee (5.0%)	\$215.31
				Total	\$4,521.56
				Payment (04/18/2022)	-\$4,521.56
				Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$4,521.56	)-( \$4,521.56	= \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 31 days.



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 421
Date: 05/06/2022
Due On: 05/31/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	03/29/2022	Work on proposed order language	0.75	\$325.00	\$243.75
Service	03/30/2022	Telephone call with attorney Phillips	0.50	\$325.00	\$162.50
Service	03/30/2022	Review pleadings	0.75	\$325.00	\$243.75
Service	03/31/2022	Telephone call with George Phillips	0.50	\$325.00	\$162.50
Service	03/31/2022	Review edits	0.50	\$325.00	\$162.50
Service	04/04/2022	Request bank statements; Review bank statement activity; Prepare accountings per Attorney Weiler (2017 through 2021)	5.50	\$150.00	\$825.00
Service	04/04/2022	Review proposed order form client	0.75	\$325.00	\$243.75
Service	04/04/2022	Telephone conf with attorney Phillips	0.50	\$325.00	\$162.50
Service	04/04/2022	Exchange emails	0.50	\$325.00	\$162.50
Service	04/05/2022	Review proposed order extensive phone call with clients	1.00	\$325.00	\$325.00
Service	04/05/2022	Update file; prepare file for hearing	0.40	\$175.00	\$70.00
Service	04/06/2022	Status conf	0.40	\$325.00	\$130.00
Service	04/06/2022	Work on accounting; telephone conf with counsel; telephone conf with clients	2.00	\$325.00	\$650.00

Service	04/07/2022	Phone call to Wells Fargo requesting statements; Email third party form to Cynthia Wolfe for signature	0.75	\$150.00	\$112.50
Service	04/07/2022	Review revisions; review releases; attention to questions from S. Rohn re same	0.50	\$325.00	\$162.50
Service	04/08/2022	Review accountings; attention to questions	0.50	\$325.00	\$162.50
Service	04/11/2022	Telephone call with attorney Phillips; attention to questions from S. Rohn	0.75	\$325.00	\$243.75
Service	04/12/2022	Telephone call with Cynthia	0.50	\$325.00	\$162.50
Service	04/12/2022	Attention to questions from client, attorney Phillips and S. Rohn	0.50	\$325.00	\$162.50
Service	04/12/2022	Request documentation needed to complete accounting	0.25	\$150.00	\$37.50
Service	04/13/2022	Telephone call with attorney Phillips	0.50	\$325.00	\$162.50
Service	04/14/2022	Continue to work on file; review accounting	0.50	\$325.00	\$162.50
Service	04/14/2022	Attention to questions from S. Rohn re accounting	0.50	\$325.00	\$162.50
Service	04/14/2022	Receive and review order from court; update file	0.30	\$175.00	\$52.50
Service	04/15/2022	Continue to work on file	0.50	\$325.00	\$162.50
Service	04/15/2022	Telephone call with Attorney George Phillips regarding accounting	0.25	\$150.00	\$37.50
Service	04/18/2022	Continue to work on file	0.50	\$325.00	\$162.50
Service	04/19/2022	Review and analyze box of documentation provided by C. Wolfe in regard to accounting	4.50	\$150.00	\$675.00
Service	04/19/2022	Attention to questions S. Rohn; review additional materials	1.75	\$325.00	\$568.75
Service	04/20/2022	Review correspondence and file notes; attention to questions from S. Rohn re accounting	0.75	\$325.00	\$243.75
Service	04/21/2022	Continue to work on file	0.75	\$325.00	\$243.75
Service	04/22/2022	Review correspondence and e-mails	0.50	\$325.00	\$162.50
Service	04/22/2022	Telephone conf with G. Phillips	0.50	\$325.00	\$162.50
Service	04/26/2022	Extensive telephone conference with attorney Phillips	0.75	\$325.00	\$243.75
Service	04/26/2022	Attend status conf; update D. Lind subsequent to status conf	0.50	\$325.00	\$162.50
Service	04/27/2022	Telephone conf with client	0.50	\$325.00	\$162.50
Service	04/27/2022	Extensive telephone conf with attorney Phillips	0.75	\$325.00	\$243.75
Service	04/28/2022	Telephone conf with attorney Phillips	0.75	\$325.00	\$243.75
Service	04/29/2022	Work on accounting; telephone conf with attorney Phillips	1.00	\$325.00	\$325.00
				Subtotal	\$8,927.50

Admin Fee (5.0%)	\$446.38
Total	\$9,373.88
Payment (05/23/2022)	-\$9,373.88
Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$9,373.88	)-( \$9,373.88	) = \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 25 days.

**WEILER LAW GROUP, PLC**

Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955**INVOICE**Invoice # 726
Date: 06/01/2022
Due On: 06/30/2022Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502**Wolfe, Anne****Trust Administration**

Type	Date	Notes	Quantity	Rate	Total
Service	05/02/2022	Prepare inventory and 5 yearly accountings to be filed with Midland Probate Court (2017 - 2021)	5.50	\$150.00	\$825.00
Service	05/02/2022	Work on accounting	2.00	\$325.00	\$650.00
Service	05/03/2022	Telephone conf with client re admin; review file notes	1.00	\$325.00	\$325.00
Service	05/03/2022	Assist with inventory and accountings; draft 5 petitions to allow annual accountings 1 through 5; telephone calls with court; draft notice of hearing; telephone call with attorney Phillips' office; update file	3.00	\$175.00	\$525.00
Expense	05/04/2022	Postage: Postage	1.00	\$97.38	\$97.38
Service	05/04/2022	Telephone conf with attorney Phillips	1.00	\$325.00	\$325.00
Service	05/04/2022	Review pleadings and correspondence	0.50	\$325.00	\$162.50
Service	05/05/2022	Telephone conf with attorney Phillips	0.50	\$325.00	\$162.50
Service	05/05/2022	Attention to emails	0.50	\$325.00	\$162.50
Expense	05/05/2022	Reimbursable expenses: Ck 1125 Midland Co Probate Court Filing fees - 5 accountings	1.00	\$100.00	\$100.00
Service	05/05/2022	Finalize accounting documents; serve on interested parties; draft proof of service; draft letter to court; hand deliver to court for filing; update file	2.50	\$175.00	\$437.50

Service	05/09/2022	Telephone conf with attorney Phillips	0.50	\$325.00	\$162.50
Service	05/09/2022	Review orders	0.50	\$325.00	\$162.50
Service	05/10/2022	Receive correspondence	0.50	\$325.00	\$162.50
Service	05/11/2022	Continue to work on file; Exchange correspondence	0.50	\$325.00	\$162.50
Service	05/12/2022	Review proposed order	0.50	\$325.00	\$162.50
Service	05/16/2022	Communicate with counsel	0.50	\$325.00	\$162.50
Service	05/18/2022	Update file with new filings	0.30	\$175.00	\$52.50
Service	05/23/2022	Review correspondence	0.50	\$325.00	\$162.50
Service	05/24/2022	Review correspondence	0.50	\$325.00	\$162.50
Service	05/25/2022	Telephone conf with opposing counsel	0.50	\$325.00	\$162.50
Service	05/25/2022	Review correspondence	0.50	\$325.00	\$162.50
Service	05/26/2022	Telephone conf with opposing counsel	0.50	\$325.00	\$162.50
Service	05/26/2022	Review correspondence	0.50	\$325.00	\$162.50
Service	05/31/2022	Telephone conf with client; review e-mails	0.50	\$325.00	\$162.50
Service	05/31/2022	Prepare proposed Orders for 5 accountings; telephone and email communications with court; prep file for hearing	0.70	\$175.00	\$122.50

Subtotal	\$6,059.88
Admin Fee (5.0%)	\$293.13
Total	\$6,353.01
Payment (06/20/2022)	-\$6,353.01
Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$6,353.01	) - ( \$6,353.01	) = \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 29 days.

**WEILER LAW GROUP, PLC**

Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955**INVOICE**Invoice # 1132
Date: 07/01/2022
Due On: 07/31/2022Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502**Wolfe, Anne****Trust Administration**

Type	Date	Notes	Quantity	Rate	Total
Service	06/01/2022	Prepare for hearing	1.00	\$325.00	\$325.00
Service	06/02/2022	Prepare for hearing on accountings	1.50	\$325.00	\$487.50
Service	06/02/2022	Telephone conf with attorney Phillips	0.50	\$325.00	\$162.50
Service	06/03/2022	Work on file; review with co-counsel and opposing counsel; review proposed order	0.50	\$325.00	\$162.50
Service	06/06/2022	Telephone conf with client	1.00	\$325.00	\$325.00
Service	06/06/2022	Prepare for telephone conf with client; telephone conf with attorneys	0.75	\$325.00	\$243.75
Service	06/07/2022	Continue to work on file; instruct D. Lind; communicate re mediation	0.75	\$325.00	\$243.75
Service	06/08/2022	Continue to work on file	1.00	\$325.00	\$325.00
Service	06/09/2022	Communicate with opposing counsel	0.50	\$325.00	\$162.50
Service	06/10/2022	Correspondence	0.50	\$325.00	\$162.50
Service	06/15/2022	Continue to work on file	0.75	\$325.00	\$243.75
Service	06/16/2022	Review file with counsel	0.50	\$325.00	\$162.50
Service	06/17/2022	Continue to work on file	0.50	\$325.00	\$162.50
Service	06/20/2022	Continue to work on file	0.75	\$325.00	\$243.75

Service	06/22/2022	Continue to work on file	0.50	\$325.00	\$162.50
Service	06/24/2022	Review mediation	0.50	\$325.00	\$162.50
Subtotal					\$3,737.50
Admin Fee (5.0%)					\$186.88
Total					\$3,924.38
Payment (07/22/2022)					-\$3,924.38
Balance Owing					\$0.00

Statement of Account

Outstanding Balance		New Charges		Payments Received		Total Amount Outstanding
(	\$1,132.40	+	\$3,924.38	) - (	\$3,924.38	) = \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 30 days.



WEILER LAW GROUP, PLC

Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 1437
Date: 08/01/2022
Due On: 08/31/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	07/05/2022	Work on mediation	0.50	\$350.00	\$175.00
Service	07/13/2022	Work on mediation	0.75	\$350.00	\$262.50
Service	07/14/2022	Work on mediation	0.50	\$350.00	\$175.00
Service	07/14/2022	Review pleadings	0.75	\$350.00	\$262.50
Service	07/15/2022	Work on mediation	1.00	\$350.00	\$350.00
Service	07/15/2022	Review pleadings	0.75	\$350.00	\$262.50
Service	07/18/2022	Work on mediation; review materials	1.00	\$350.00	\$350.00
Service	07/19/2022	Work on and prepare for mediation	1.00	\$350.00	\$350.00
Service	07/19/2022	Telephone call with court; draft re-notice of hearing; email counsel; email and mail serving interested parties; draft proof of service; draft letter to court; update file	0.90	\$175.00	\$157.50
Service	07/20/2022	Work on mediation	0.75	\$350.00	\$262.50
Service	07/21/2022	Continue to work on file	0.75	\$350.00	\$262.50
Service	07/27/2022	Review correspondence	0.50	\$350.00	\$175.00
				Subtotal	\$3,045.00

Admin Fee (5.0%)	\$152.25
Total	\$3,197.25
Payment (08/22/2022)	-\$3,197.25
Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$3,197.25	)-( \$3,197.25	= \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 30 days.

**WEILER LAW GROUP, PLC**

Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955**INVOICE**Invoice # 1724
Date: 09/01/2022
Due On: 09/30/2022Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502**Wolfe, Anne****Trust Administration**

Type	Date	Notes	Quantity	Rate	Total
Service	08/01/2022	Review pleadings	0.75	\$350.00	\$262.50
Service	08/01/2022	Correspondence	0.75	\$350.00	\$262.50
Service	08/02/2022	Review proposal	0.75	\$350.00	\$262.50
Service	08/02/2022	Prepare for and attend hearing	0.75	\$350.00	\$262.50
Service	08/02/2022	Email communication with court; update and finalize 5 Orders	0.30	\$175.00	\$52.50
Service	08/03/2022	Review correspondence	0.75	\$350.00	\$262.50
Service	08/03/2022	Serve Orders on interested parties; draft proof of service; draft letter to court; update file	0.60	\$175.00	\$105.00
Service	08/04/2022	Telephone conf with clients	1.00	\$350.00	\$350.00
Service	08/08/2022	Review communication	0.50	\$350.00	\$175.00
Service	08/09/2022	Telephone conf with attorney Phillips	0.50	\$350.00	\$175.00
Service	08/09/2022	Email communication to attorney Hewitt regarding mediation agreement	0.20	\$175.00	\$35.00
Service	08/17/2022	Continue to work on file	0.50	\$350.00	\$175.00
Service	08/29/2022	Continue to work on file	0.50	\$350.00	\$175.00

Subtotal	\$2,555.00
Admin Fee (5.0%)	\$127.75
Total	\$2,682.75
Payment (09/26/2022)	-\$2,682.75
Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$2,682.75	)-( \$2,682.75	= \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 29 days.



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 1982
Date: 10/01/2022
Due On: 10/31/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	09/06/2022	Continue to work on file	0.75	\$350.00	\$262.50
Service	09/07/2022	Correspondence	0.50	\$350.00	\$175.00
Service	09/12/2022	Work on file	0.75	\$350.00	\$262.50
Service	09/13/2022	Continue to work on file	1.00	\$350.00	\$350.00
Service	09/14/2022	Prepare for mediation	1.50	\$350.00	\$525.00
Service	09/15/2022	Work on mediation	1.00	\$350.00	\$350.00
Service	09/16/2022	Work on file	0.75	\$350.00	\$262.50
Service	09/16/2022	Review pleadings	0.50	\$350.00	\$175.00
Service	09/19/2022	Work on file	1.00	\$350.00	\$350.00
Service	09/20/2022	Telephone conf with clients	0.75	\$350.00	\$262.50
Service	09/20/2022	Review pleadings	0.50	\$350.00	\$175.00
Service	09/20/2022	Work on mediation	1.00	\$350.00	\$350.00
Service	09/20/2022	Prepare draft of mediation summary letter to mediator Chuck Hewitt	0.70	\$175.00	\$122.50
Service	09/21/2022	Finalize summary letter to Mediator; email communication with counsel; email communication with client; prepare file for mediation meeting	0.70	\$175.00	\$122.50

Service	09/21/2022	Prepare for mediation	2.00	\$350.00	\$700.00
Service	09/22/2022	Travel to and from mediation; attend and conduct mediation	7.00	\$350.00	\$2,450.00
Service	09/23/2022	Update file notes	0.75	\$350.00	\$262.50
Service	09/26/2022	Work on file; review correspondence from mediator	0.75	\$350.00	\$262.50
Service	09/27/2022	Multiple emails with counsel regarding scheduling continuation of mediation	0.50	\$175.00	\$87.50
Service	09/27/2022	Attend and conduct status conf	0.50	\$350.00	\$175.00
Service	09/27/2022	Work on file	0.50	\$350.00	\$175.00
Service	09/28/2022	Email communications with all counsel; email communication with client - regarding mediation	0.20	\$175.00	\$35.00
Service	09/28/2022	Correspondence/conference with opposing counsel	0.75	\$350.00	\$262.50
				Subtotal	\$8,155.00
				Admin Fee (5.0%)	\$407.75
				Total	\$8,562.75
				Payment (10/18/2022)	-\$8,562.75
				Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$8,562.75	)- ( \$8,562.75	= \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 30 days.



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 2256
Date: 11/01/2022
Due On: 11/30/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	10/03/2022	Work on file	0.75	\$350.00	\$262.50
Service	10/04/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/05/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/06/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/07/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/10/2022	Telephone conf with client	0.50	\$350.00	\$175.00
Service	10/10/2022	Continue to work on file	1.50	\$350.00	\$525.00
Service	10/11/2022	Work on file/mediation	1.50	\$350.00	\$525.00
Service	10/12/2022	Work on mediation	1.50	\$350.00	\$525.00
Service	10/13/2022	Attend and conduct mediatoion	3.00	\$350.00	\$1,050.00
Service	10/13/2022	Attend mediation.	2.40	\$250.00	\$600.00
Service	10/14/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/17/2022	Work on file; telephone conf with client	0.75	\$350.00	\$262.50
Service	10/18/2022	Work on file	1.00	\$350.00	\$350.00
Service	10/19/2022	Telephone conf with client	0.50	\$350.00	\$175.00

Service	10/19/2022	Telephone conf with attorney Phillips	0.30	\$350.00	\$105.00
Service	10/20/2022	Continue to work on file	0.75	\$350.00	\$262.50
Service	10/24/2022	Telephone conf with client; review emails	0.50	\$350.00	\$175.00
Service	10/25/2022	Review file in advance; attend and conduct hearing	0.50	\$350.00	\$175.00
Service	10/25/2022	Work on agreements re settlement	1.00	\$350.00	\$350.00
Service	10/25/2022	Prepare draft of stipulation and order approving stipulated agreement for petty cash account and closing of court's file; prepare draft of mutual release and hold harmless agreement	1.50	\$175.00	\$262.50
Service	10/27/2022	Work on settlement documentation and order	1.50	\$350.00	\$525.00
Service	10/27/2022	Email communications with counsel	0.30	\$175.00	\$52.50
Service	10/31/2022	Review correspondence	0.50	\$350.00	\$175.00
Service	10/31/2022	Review settlement agreements and order and e-mails	1.00	\$350.00	\$350.00
				Subtotal	\$8,632.50
				Admin Fee (5.0%)	\$431.63
				Total	\$9,064.13
				Payment (11/14/2022)	-\$9,064.13
				Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$9,064.13	)- (\$9,064.13	= \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 29 days.



WEILER LAW GROUP, PLC
Elder Law | Estate Planning | Probate

5820 Eastman Avenue
Midland, Michigan 48640
(989) 492-0955

INVOICE

Invoice # 2502
Date: 12/01/2022
Due On: 12/31/2022

Christopher Wolfe
3220 Sunset Beach Drive, NW
Olympia, Washington 98502

Wolfe, Anne

Trust Administration

Type	Date	Notes	Quantity	Rate	Total
Service	11/04/2022	Correspondence	0.50	\$350.00	\$175.00
Service	11/08/2022	Review emails	0.75	\$350.00	\$262.50
Service	11/09/2022	Work on file; review releases; telephone conf with client; telephone conf with attorney Phillips	1.00	\$350.00	\$350.00
Service	11/15/2022	Review materials and release	0.50	\$350.00	\$175.00
Service	11/16/2022	Work on release and communication with client	0.50	\$350.00	\$175.00
Service	11/16/2022	Continued work on hold harmless release	0.70	\$175.00	\$122.50
Service	11/17/2022	Communicate with counsel and client	0.50	\$350.00	\$175.00
Service	11/22/2022	Work on file	0.50	\$350.00	\$175.00
Service	11/28/2022	Prepare for phone conference	0.50	\$350.00	\$175.00
Service	11/30/2022	Begin draft of motion to enforce execution of mutual release agreement; draft notice of hearing; telephone call with court; serve interested parties; email with counsel; draft letter to court; update file	1.00	\$175.00	\$175.00
Service	11/30/2022	Attend status conf; make notes to file re same	0.50	\$350.00	\$175.00
				Subtotal	\$2,135.00
				Admin Fee (5.0%)	\$106.75

Total	\$2,241.75
Payment (12/20/2022)	-\$2,241.75
Balance Owing	\$0.00

Statement of Account

Outstanding Balance	New Charges	Payments Received	Total Amount Outstanding
(\$1,132.40	+ \$2,241.75	)- ( \$2,241.75	) = \$1,132.40

Please make all amounts payable to: Weiler Law Group, PLC

Please pay within 30 days.