

Summary of Expenses for the Anne R. Wolfe Trust

(based on Lawsuit initiated by Hal Wolff filed in Midland Co. Probate Court on 12/12/2021)

File No: 21-1959-TV

Weiler original total from 12/23/21 - 11/30/22 \$55,906.44 (reference)

Expenses for Joseph Weiler from 12/23/21 - 12/27/22 \$57,406.34

Expenses for Joseph Weiler from 1/01/23 - 6/29/23 \$18,627.36

Representing Chris & Cynthia Wolfe

Total for J. Weiler: \$76,033.70

Total of noted entries for accounting costs: \$8,797.50 (reference)

Expenses for George Phillips from 3/1/22 - 10/5/22 \$12,231 (not itemized)

Expenses for George Phillips from 10/6/22 - 4/21/23 \$3,580 (Itemized)

Total for G. Phillips: \$15,811

(Time statements prior to 10-6-22 were not provided.)

Expense for Smith Brooker PC from 9/31/21 - 10/13/21 **\$1,980**

Mediation service provided.

Expenses for Cynthia Wolfe from 12/9/21 - 12/15/22 **\$7,657**

This is a combination of normal Trustee issues plus the lawsuit

Total for normal Trustee related support: \$1,091 15.1%

Total for Trust Lawsuit: \$6,151 84.9%

Total Itemized: \$7,242 94.6%

Grand Total of Trust expense (for entire case): \$97,902

Expenses paid for by Hal Wolff (not burdened to Anne's Trust)

Expenses for Geoff Malicoat from 8/24/21 - 2/01/23 **\$7,725**

Representing Hal Wolff

Malicoat expenses for filing suit: \$1,550

Malicoat expenses post filing: **\$5,725**

G. Phillips total vs Malicoat total: 205% **2 to 1**

J. Weiler total vs Malicoat total: 984% **10 to 1**

J. Weiler total vs Malicoat total (less accounting): 870% **9 to 1**

Prepared by Hal Wolff

Updated: 3/26/2024

2023 expenses for J. Weiler:

(by month)

1/1/23 to 1/31/23 \$5,148

Admin fee: \$243.00

Total: \$5,391.00

Invoice: \$5,758.50

(This included 12/27/22.)

2/1/23 to 2/28/23 \$4,352.00

Admin fee: \$217.60

expense: \$82

Total: \$4,651.48

3/1/23 to 3/31/23 \$3,762.50

Admin fee: \$188.13

expense: \$20

Total: \$3,970.63

4/1/23 to 4/31/23 \$2,310.00

Admin fee: \$115.50

expense: \$0

Total: \$2,425.50

5/1/23 to 5/30/23 \$2,075.00

Admin fee: \$103.75

expense: \$0

Total: \$2,178.75

6/29/2023 \$10

2023 Total: \$18,627.36

Note: 52% of Joe's entries are for 0.5 hrs. Only 2 of 248 are for less. Possible overcharge*: 5-15 grand.

* based on data w/other lawyers on case