

Time Statement for Cynthia Wolfe for time on Anne's Trust

rate \$35

<u>#</u>	<u>date</u>	<u>note</u>	<u>time</u>	<u>amount</u>
1	12/09/21	Read letter about Trust from Hal, e-mailed response to all; discussed with Chris, Susan and Joel Hal's harassing / threatening behavior (let us know only 6-12 months later)	3.0	\$105.0
2	12/10/21	Anne & Chris talked - Anne said she never could find my e-mail sent 1 week ago and also 2 weeks ago answering her questions and concerns having energy eval. of condo (I had said yes, go ahead with first step towards her desire for new windows) and her clothes (I had said yes, she needed to decide what she wanted and fill out order form to send out to me for payment etc. So I resent e-mail and told her to read my e-mail of yesterday Anne told Chris we have refused to pay bills (never) and she thought we had told Wilds to send the bill to her address (we had no idea there was any bill or issue - not sue since I checked dates of last annual Wild's bill for regular service. Anne really felt we had. (I think she is coming undone, not just a poor memory - some paranoia with this issue not warranted in reality.	2.0	\$70.0
3	12/11/21	Reviewed Hal's letter again. Looked through Trust papers for older Trust Anne asked for on 12/9 and 2 years ago but not found Called Geoff Malicoat ~2 pm his time. Asked him about process. He said invitation to the meeting would be sent to all; we would need lawyers present for all "sides" in order for judge to act (equal representation)	2.0	\$70.0
4	12/12/21	Discussions by phone & e-mail to Anne by Chris, myself to try to understand all issues raised; reviewed e-mail from Hal & Chris and discussed with Chris; he called Alan also.	5.0	\$175.0
5	12/14/21	checked for replies from family - none	1.0	\$35.0
	12/15/21	discussed w Susan & Joel to put 11th on their calendar; discussed w Anne; she told me they had tried to make her sign on to the suit but she was surprised, unaware of what it was about and what was happening. She did not sign, she said. I informed her of what Geoff told me about the process and that she needed to be present. She said she had an appt with doctor but would change it. She said neither Hal nor Geoff had told her of the date.		
6	12/16/21	I called Weiler's to briefly tell him about Hal's suit. We had not received, still, the packet which Hal told us to expect and which Geoff told me he had sent. Joe told me to e-mail Geoff and ask for petition etc to be e-mailed to me, since it is holiday season coming but I should be prepared with whole family for 11th	0.5	\$17.5
7	12/17/21	Talked w Hal's lawyer G. since still no replies to my e-mail nor in mail. He said Anne came into his office today 10 AM and said she wanted the suit to go forward. I told G. that was not what Anne told us. She had told us that she wanted "the family to solve the issues, not the legal process." G. reiterated she wanted the legal process. I told G. that I thought A. was being manipulated into it. G. suggested a corporate Trustee. I said that would cost her Trust a great deal and not provide the type of care A. required - ie 24 hrs a day on call access for help from 2 family members who were physicians. G. disagreed. * note - A. has also started saying we are not good Trustees!	1.5	\$52.5
		Next I talked to Brian White who told me that usually Corp trustee gets 1.25% of Trust value per yr. and they usually don't take on Trusteeship of < \$1 M I received Trusts 2007 - 3rd Amendment; only mention of Corp Trustee was of Chem Bank which got bought out; E-mailed Trust to Brian White as requested.		
8	12/18/21	Multiple discussion w Anne, Joel, Chris + Joel offered to call + see A. more often now that he is retired and freer. (transcription note - hours here was partially cut off of page)	3.0	\$105.0

	12/19/21	Family communications & suit / issues	na	
9	12/19/21	Cyn had 2 talks w Anne about ordering her pants and discussed her e-mail w list of condo needs. She will prioritize the list and will get working on it.	2.0	\$70.0
		Discussed looking for an assistant in near future, she said she used a cleaning lady once a month for \$18. I offered for Trust to pay but A said she gets the service.		
		Discussed A's eye issues (again) and she will send her opth. last note so I can review w specialist to figure out what her issues really are, since A has given me conflicting statements over the years, about whether she has cataracts or not.		
10	12/20/21	I called Midland nursing homes and Care For Aging Federal Center, gathered info from professionals. Verified that essentially Medicare does NOT pay for assisted living nor nursing home care except rarely when client has already been there for > 2 yrs and runs out of money.	2.0	\$70.0
11	12/20/21	read and responded to e-mails w Anne (+ Chris) gathered, copied, printed Malicoat papers and sent to Joe Weiler and Trust to Brian White e-mailed for confirmations w all	2.0	\$70.0
12	12/28/21	Organized, reviewed family discussion about A's Trust and issues Hal has	2.0	\$70.0
13	01/01/22	read Anne's panic attack - (about computer, she called 911) phone calls discussion w Anne, Chris and let Joe know Hal's pressure is affecting her	2.0	\$70.0
14	01/04/22	Composed letter to Anne, Weiler, organized e-mails and discussed w Chris and Joel + Susan	4.0	\$140.0
15	01/05/22	Collected yr's of 2021 data and printed, worked on Anne's accounting CPA form for Trust	3.0	\$105.0
16	01/08/22	prep work for 11th, now 13th with 2017 - 2021 data wanted by lawyers	8.0	\$280.0
17	01/12/22	Discussion w Chris & all and Anne phone	1.0	\$35.0
18	01/15/22	Prepared + e-mailed Anne; info to CPA called to confirm	3.0	\$105.0
19	01/16/22	prepared financial sheets for all years of the Trust	2.0	\$70.0
20	01/17/22	photo-scanned + e-mailed all to family about packet of info + called to F/U	3.0	\$105.0
21	01/18/22	phone conversations w Anne & Hal, her feelings, meeting next wk w lawyers, her computer	0.5	\$17.5
22	01/20/22	helped get Anne a discount for the daily newspaper she wanted, pd w Trust visa	1.0	\$35.0
23	01/21/22	discussion w Susan related to suit and planned Zoom	na	
24	01/23/22	Called Anne about washing machine, scheduling clinic visits, plans for Geoff / Chalgian zoom discussed	0.5	\$17.5
25	01/23/22	much later in the day (night) Anne called me distraught about Hal "not being sane; not in reality"; wanted psych help for Hal	0.5	\$17.5
26	01/25/22	Joe Weiler and then w Anne	0.5	\$17.5
27	01/25/22	Zoom meeting	1.0	\$35.0
28	01/26/22	e-mails w Anne about washer, offered to pay, she said unneeded + she would	na	
29	01/27/22	Chris discussions w Anne, Joel + Susan, myself	1.0	\$35.0
30	01/28/22	received Anne's e-mail to Chris, discussed, responded	2.0	\$70.0
31	1/29-1/30	more discussions w Anne about future + issues now	2.0	\$70.0
32	01/31/22	Chris discussed e-mails btw Anne, Joel who suggested mediation & Hal present called Joe W.	2.0	\$70.0
33	02/06/22	Anne called & CO detector, she had called 911 because of occasional short warning. Told her to "A" (?) battery. She wanted to discuss Olympics. I told her that we need to discuss the fact that Hal's suit was costing her Trust estimated 25-50K and asked her to discuss plans (see latter I wrote to Joe W. next)	2.0	\$70.0
34	02/09/22	Anne called me smelling "smoke burning" from her car engine	4.0	\$140.0

35	02/10/22	discussed talking to Ford. She called Ford and told her visit not recommended unless persists (probably brakes)	na	
36	02/11/22	Anne called me & power outage, so I recommended she call next door neighbor or Pres of HOA if power did not return in few hrs and ask for help opening garage door s power so she could use her car etc; she had flashlight and preparations to stay warm. Next day Anne told us that she took car to Ford but did not need payment made she said. Had to ask her what findings were to get answer it was her misuse of brakes as suspected (she drives w both feet)	na	
37	02/11/22	I spent composing my thoughts (but did not sent to Anne) will use if we go to negotiations +/- court preparing	3.0	\$105.0
38	02/27/22	discussed Chris + Hal e-mails before meeting coming up (3/15) organized notes	1.0	\$35.0
39	03/01/22	Zoom not start 8 am my time discussions w family + Hal's e-mails; following meeting then about court plans	8.0	\$280.0
40	03/07/22	phone calls w Weiler; organize/scanned/e-mailed	2.0	\$70.0
41	03/20/21	e-mailed Joe about 4/6th coming up next month confirmed w Anne and told family e-mailed reviewed	0.5	\$17.5
42	03/21/22	discussion w Joe + George + his trouble getting Anne to tell him what she wants; called Anne	0.5	\$17.5
43	03/25/22	called Anne since no e-mail form her as she had said she would write what she wanted LUM	0.1	\$3.5
44	03/29/22	worked <u>all day</u> 6 am - 9 pm on the 2017 - 2021 statements WF + Baird plus LONG talk w Anne	10.0	\$350.0
45	03/30/22	worked all day 9 am - 2 pm and 6 pm - 9 pm success getting Baird's statements past encrypted WF to download and forwarded 28 statement to Joe's assistant Stephanie for formatting into probate format demanded	8.0	\$280.0
46	03/31/22	added clause to settlement; reworked several times before e-mailed back to Joe	4.0	\$140.0
47	04/01/22	I had to call WF and get resend of Oct 2017 for Stephanie; tried to find it on our e-mails sent confirming e-mail	2.0	\$70.0
48	04/01/22	reviewed e-mails of Hal + Anne in prep	2.0	\$70.0
49	04/04/22	e-mails w Weiler & draft proposed agreement	1.0	\$35.0
50	04/11/22	gathered + organized <u>all</u> of Ellen's and Anne's Trust finances as asked	8.0	\$280.0
51	04/12/22	worked on old insurances + payments of Ellen's which probate queried	8.0	\$280.0
52	04/13/22	organized and mailed large box express to arrive Friday - let Weiler office know	1.0	\$35.0
53	04/15/22	F/U e-mails w Joe W about receiving box + phone call	0.0	\$0.0
54	04/18/22	Stephanie Rohm confirmed received + discussed accounting	0.5	\$17.5
55	04/20/22	e-mail from Hal read + discussed e-mails back & forth w Anne	2.0	\$70.0
56	04/26/22	read e-mail <u>Lena</u> forwarded me from Anne phone call to A to figure out what going on Chris came in as well, discussed w Anne w me she spouted old complaints as if they were factual same accusations Hal has made months ago w/o (?) basis	1.0	\$35.0
57	04/27/22	reviewed all communications in files and they verified the misinformation, false beliefs etc perpetrated, had not been charged in any way despite 5 months of family discussions + efforts	2.0	\$70.0

58	04/27/22	Joe W. explained plans to finish financials in "probate form" and have accounting approved by court + family He had brief "status meeting" w Judge yesterday w 2 other lawyers. Will start deposing Hal if not moved forward soon. Joe verified what I had guessed - <u>unlike</u> what Anne had said in 4/26 about him trying to pull Lena into the mess (she said " <u>Hal</u> told me that the <u>lawyers</u> asked <u>him</u> about idea of getting Lena as Trustee possibly" but "I (Anne) said that someone had to ask Lena before the lawyers put her out as a possible Trustee of the court order, "I insisted". Joe said no Lawyer involved has mentioned the idea of Lena. Clearly this is a Hal idea and he lied/manipulated to Anne to ask Lena.	0.42	\$14.56
59	05/06/22	e-mails to / from Weiler	1.0	\$35.0
60	05/10/22	worked on questions from probate (consultant + George) Figured out the 35K (+) w Chris and sent e-mail	4.0	\$140.0
61	05/11/22	Cyn reviewed all files again - Ellen's Anne's + e-mailed communications since 2017 discussed queried from probate w Brian White he will contact (from Baird now) Well Fargo old accts from discussed w (??) Stephanie (??)	8.0	\$280.0
62	05/14/23	Cyn read e-mails from George + Joe W carefully reviewed <u>proposed</u> settlement court ordered wrote reply to only possible way could solve all legally and responsibly and reduce stress to all _ more money lost discussed w Chris at length	5.0	\$175.0
63	5/24,25,26,27	Anne e-mails about variety of issues and discussions w family etc	??	
64	05/30/22	Anne + archiving	2.0	\$70.0
65	05/31/22	Talked w Joe > Stephanie to get copy of final accountings everyone else has but not us talked w Stephanie - printed + reviewed yrs 1-5 accts	2.0	\$70.0
66	06/06/22	Mt phone w Joe who had discussion + will have another w lawyers George + Jeff acct is fine; investments fine most of this petition is minor complaints not even true (and he wants to remove 2 daughters in law) + Anne need to protect by getting yearly probate accounting to be approved by court still need mediation and then depositions Joe "It is stupid" (he said for 2nd time, I said to Jeff (??)	0.5	\$17.5
67	06/12/22	made order online for her (per 5/30 entry regarding archives)	0.5	\$17.5
68	06/25/22	wrote letter e-mail to Anne about Univ. archive order asked her questions about family - she did not see/ read / remember it	0.33	\$11.55
69	07/07/22	(so resent to her 7/7) had to discuss getting stocks > cash for Anne's Trust acct since had bills lawyers to pay out	0.33	\$11.55
70	07/07/22	discussion w Anne about archive boxes ordered (she then accidentally sent boxes back telling delivery people she had not ordered them - confused because she also had ordered + pd herself for a standing desk she never asked me to pay for)	0.67	\$23.5
71	07/15/22	pd. her property tax bill (automatic tho.) for summer filed it and other papers/bills	0.3	\$8.75
72	07/15/22	read Hal's, Anne's e-mails; response letter written	1.0	\$35.0
73	07/18/22	talked w Joe Weiler & date - Thurs - scanned + e-mailed him the last communications family had (4 pages) called Anne back + discussed Medicaid plans + re-e-mailed her (??) Medical e-mail (she had not read it)	0.5	\$17.5
74	07/21/22	Discussed home help w Anne by phone (she said in e-mail she would drive home) researched her CA situation e-mailed concerns to her and asked her to plan some help	1.0	\$35.0

75	07/29/22	visited w Anne - accomplished getting her onto My Chart and leaving vm w her case worker Zack and transportation arranged w Com on Aging Midland services etc looked at flat condo she had heard before market	1.0	\$35.0
76	07/30/22	discussion w Anne by e-mails about medical situation / choices	0.0	\$0.0
77	08/01/23	read Joe's e-mails; Hal's proposal, talked w Joel + Susan about meeting 8/2	0.66	\$23.1
78	08/02/22	Gave up planned walk w friend in order to attend am meeting + Chris put off going to see pts Joe W. phoned to explain + discussed	1.16	\$40.6
79	08/07/22	read + discussed Anne's e-mailed idea of different mini-Trust, run by Trustees. I wrote e-mail reply + sent (forwarded) her suggestions to Joe W.	0.5	\$17.5
80	09/08/22	phone message to Anne earlier about Wild's heating + cooling notice e-mails to explain it to her 2 each e-mail to J. Weiler about 9/22 coming up - Chris + Joel not able, he said Cyn could handle it	0.5	\$17.5
81	09/18/22	preparing for meeting w lawyers and family downloaded and printed 5 articles about SNT legalities discussed with Chris + Alan	3.0	\$105.0
82	09/19/22	called J. Weiler's office prepare for negotiation	0.5	\$17.5
83	09/22/22	Mt w Negotiator, Anne, Hal + lawyers	4.5	\$157.5
84	09/26/22	called J. Weiler's office prepare for 9/27 Judge mt (cancelled) discussions w Trustee Chris & others	0.25	\$8.8
85	10/06/22	received auto insurance application, bill, and called office to confirm I would sign for Anne + mail check e-mail from Anne read + responded about dryer Hal's e-mail (via his lawyer to Joe W) demands read discussed w Joe W by 2 e-mails	1.25	\$43.8
86	10/7-8-9	e-mails w Anne, Chris, calls to Hal, Alan, Anne trying to protect \$ losses from Anne's Trust due to continued needless points in suit from Hal + Anne	1.0	\$35.0
87	10/13/22	negotiation mt, then some e-mails, discussion about accounting costs + requirements - Stephanie Rohn sent sample probate court form etc I talked w Brian White at Baird to get stocks sold so have enough for the \$10K due in 2nd checking acct "mini trust" as stipulated e-mails + Joe Weiler also	5.0	\$175.0
88	10/16/22	considering mini-Trust e-mail to family + Joe Weiler call w Joe composing + sending 2nd e-mail to Hal (especially) + Anne about what is considered ok + <u>not</u> (ie paying Hal to do acct or work of mini-Trust forced on us by his lawsuit)	3.0	\$105.0
89	10/17/22	e-mails & "willing" to Anne's Trust 0 Alan	1.0	\$35.0
90	10/18/20	e-mails w Anne & her ill health, ER visit & in job, etc	2.0	\$70.0
91	10/24/22	e-mails w Joe W., Susan + Joel, + tel calls + saw(??) + texts to arrange signatures despite their traveling	0.5	\$17.5
92	10/26/23	e-mail from Joe not received signatures, e-mail to Susan etc discussion w Joe phone about same + why Susan no sig line	0.5	\$17.5
92	10/26/23	e-mail and calls w Anne to get assistance, space for her boxes, medical state, future needs etc e-mails w Alan about putting inheritance to Trust of Anne and getting cert. of Trust from Weiler to us / him (short discussion w Joe W.)	1.5	\$52.5
93	10/28/22	Anne in Hosp. Discussion about future living plans rehab > her condo - if not, then Assisted Living c assistance we find	??	
94	10/31/22	Talked w Anne + plans talked w discharge case worker hosp tried to fax HIPAA multiple times researched multiple home assistance options in Midland	2.0	\$70.0

95	11/01/22	Called all 3 Home Assistance agencies and received and read e-mailed info filed called Ctr. Aging for discussion w Anne's case Manager Called hospital to confirm discharge planning + they received HIPAA form (Anne had signed) and I had faxed yesterday	4.0	\$140.0
96	11/8+9	Discussion w family members since Anne not answering my calls dealt w Joe W. case payment	2.0	\$70.0
97	11/12/22	Hal not signed Anne called me w ques about starting chemo - explained why best to heal from Covid first	0.5	\$17.5
98	11/19/22	I paid furnace maintenance annual bill + mailed it we LUM w Anne since she told us she would be moving Monday yet it has been 5 days and we still have not been contacted about where she is	0.5	\$17.5
99	11/20/22	Many frustrating conversations trying to help her with her dryer issue over past months	1.0	\$35.0
100	12/4+5	multiple discussion by e-mail + phone about her ^ in her dues (to \$300) and how to get the bank/accounting form received to me in time. We decided best for her to go to Office Store (Staples) and have store help her scan + e-mail it to me. Attempt failed to come thru 1st time so she returned to Staples and made sure they read e-mail address correctly. It did come it. I called the HOA accountant to get permission to e-mail it to her office (that option was not on the form)	1.0	\$35.0
101	12/07/22	I called Anne to tell her that I appreciated the system we used and get the from to the HOA acct. clarified I would as Trustee Financial	0.5	\$17.5
102	12/13/22	read Joe's motion reviewed Hal's re-write of #3 had been disused w Chris, Joel + Susan e-mailed and called Joe's office preparing for mini-Trust set up assuming Hal would sign again OR judge's order would push us on our way	2.0	\$70.0
103	12/13/22	Finally got a copy be e-mail (snail mail which other got did not reach me ever) sent to me when I called Read Joe's motion complied 2022 time files preparing for accountant aid	2.0	\$70.0
104	12/14/22	Made plan w Baird to ^ cash in Anne's Trust acct so can be prepared to fund mini-Trust	2.0	\$70.0
105	12/15/22	Anne called to ask for Laura's address but then I explained what we were busy doing about getting/keeping 10K ready she seemed to have forgotten that Chris told her twice + e-mailed family (including her) that we were selling some stock so would have cash she thought (again, still) that we had "already funded the mini-Trust account" I asked her if she knew where we were w Hal needing to sign and she said she did not know but would see him this coming weekend and ask him. I told her that I am always just trying to do my responsible tasks in time as Trustee and how frustrated I was to hear that after 12 months of Hal's claim starting the lawsuit process, we are still nowhere, due to his signing with all other family members the agreement but then refusing to sign the legal paperwork for the court. I explained my deep frustration and dismay of the amount of money wasted and time, but even more the destruction of relationships for <u>no</u> good reason. She said there were good reasons - asked me if I had sent out accounting of her Trust and I said I had send out accountings of her Trust I said I had, after the end of each year except the first, when I was still busy w her mother's estate work (delayed by Hal then too, because he threatened to sue and refused to sign the release for the closure of her <u>mom's</u> estate.)	1.0	\$35.0

12/15 cont Anne & I talked about the responsibility of the mini-Trust. She agreed that we all need to insure that she does not lose her Medicaid, She also said she understands that she cannot have a debit card to the mini-Trust acct, I told her that Hal had written earlier that he proposed doing that. I don't trust that he understands a lot of things and unfortunately I don't trust him (as his mother told Joel before she died) Hal's track record is a lifetime has not been great despite his MBA. Anne told me (her 4th mention of it) that she doesn't think we need a mini-Trust. Yet she told me she has not told that to Hal yet.

We ended the discussion by me saying that it is up to Hal and her - the lawyers have brought us to this point but I personally don't care anymore. I am exhausted by the circling back, lack of clear decision abilities on her part and lack of clear responsibilities on Hal + her past. I explained that I spent 6 years helping her as a Trustee, sister-in-law, sister and caring physician. I now realize that she does not want that relationship and I am not her Guardian - I will continue on as a financial Trustee.

Totals: 206.9 \$7,242

written total

(car repair)
12/18/22

13,905 minutes

231.75 hours

\$8,111.25

(\$456.14) double reimburse

\$7,655.11 check 2089

\$7,657 stated on transcripts

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

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

Total Itemized: 94.6% \$7,242