

On Oct 8, 2022, at 4:44 PM, Anne Wolfe <wolferanne@gmail.com> wrote:

Chris,

I see you tried to call me a couple of times.

I have had some distractions and concerns - I learned my friend Rose is in the hospital - she has had three falls at her 'place' in the last two or three days and is afraid to go back home - doesn't know why it is happening.

I wouldn't be much help as she can be dead weight.

I know you would like to get this thing wrapped up - I would too - I don't know if I see your logic as the best way of going about it - but it might be - I have tried to think about Hal's mini-trust - it looks rather complicated to me.

Having your verbal barrage coming at me just deadlocks me mentally. Then I won't/can't/whatever come to any conclusion. It's like being hit over the head again and again - not quite - it isn't mean or anything, I tis just rather not helping me think I have to get calm, collected and have some space to think. I hope you can understand that. I believe you mean well.

Please try not to interpret everything I do as me being manipulative or selfish - Dad often resorted to that kind of thinking when he didn't understand me and thought I was 'contrary' and I think there was some sexist thinking involved - that as a female I was not a true, honest Wolfe - I was being a doggone female - ! I ask you not, please, to look at me that way.....if possible - - if you do, that is. Perhaps I am wrong - I hope.

Anyway, I have had a lot of time to try and think. About a lot of things.

You might as well know I have been corresponding with Jorge Almeida by email for some time - not in a romantic way, just as an old friend - he is being nice. His mother is 95, frail, and he is taking care of her, has moved in with her. I am not telling him much that is very personal about anything, just chatting mostly. He has four years until he retires, he is 66, he is a professor of math, and has made some waves in the world of mathematics, if you googled him....but he is quite humble. There has been a pause lately.

I don't know what Rose can do - she lives in a tiny cramped apartment sort of, that has some definite disadvantages to it - a shower that is inside a bathtub - she shouldn't have a bathtub unless it has a door to it - she fell trying to get into the bathtub, for one thing. She can't catch herself, she has injured herself so many times it is like she is crippled now, almost. She nearly died in an awful car accident years ago. Best guess is she either had a seizure or heart attack that caused it.

Anyway, since Hal is so attached to his modification of the mini-trust which was my lawyer's idea, I have given a bit of thought of taking some money out of it and making it simpler - and so anyone in the family might be involved in it if they wished, as a companion(s) and making it make more sense, if possible. Who would want to be my companions - I don't know - but I would so much prefer if I would travel that my companion(s) would be family. Loved that Grand Canyon trip. We can't do that. But I'd prefer - you and Cynthia - Joel and Susan, Hal and Alan, Claudia,, or Clousin Anne or Libby.....

I am seeing cross-eyed, must stop.

This message is not 100% private, you can share it with Cynthia..... I will continue to think of what might either take the mini trust less-objectionable so that it is not an impediment to solving this.....or if we can find a way that we can compromise and resolve this without stepping on feet.

Anne

[christopher wolfe](mailto:clwolfe@comcast.net) <clwolfe@comcast.net>

To: Anne Wolfe

Cc: Hal Wolfe, Joel Wolfe, Susan & Joel Wolfe, Alan Wolfe

Sun, Oct 9 at 12:32 PM

Anne,

At your suggestion, I called Hal twice yesterday on his home phone. I got no answer, and left two messages.

I do not feel that the legal route will bear fruit and suggest that our family (including Hal) and try a different approach - family discussion. The legal approach, including mediation, is expensive and does not appear to be getting us anywhere. The current proposal of Hal's is a definite step backward. Furthermore, the lawyers in this case have been quite liberal (? aggressive, ?) in billing for their services (currently \$30,000 - \$40,000 in legal fees). We are not close to any resolution of this issue. It should be pointed out that Joe Weiler informed the family that the cost of a lawsuit would be \$50,000 to \$100,000. Hal chose to initiate a lawsuit, anyway. We can't say that we were not warned!!!

I believe that you may be conflicted with the prospect of having a mini-trust at your (?Hal's???) disposable. I sense your desire to have easier access to cash. But that is not what your Special Needs Trust was primarily established for. Nor was it created to give you an unlimited expense account. It was established for your wellbeing, as your health and physical capacity may decline in the future. This would include home assistance and/or assisted living, the **costs of which are not covered by Medicare or Medicaid**.

you have stated that we don't give you everything you want to buy. Anne, you have a history of impulsive spending and commonly pick the most costly items, when you do buy something (e.g, wanting to buy an expensive new oven, instead of cleaning the one you have). Part of my role as trustee, is to "protect you from yourself", in this regard. I want the best for you, but do not want your valuable SNT to be spent on unnecessary purchases

You and Hal have emphasized wanting to travel. Quite frankly, your physical ability to travel is somewhat compromised. Additionally, with the ongoing COVID endemic, travel continues to have risks. Two friends of ours just travelled to Missouri and both caught COVID. Two other friends just got back from Portugal yesterday and both have suffered from several days of vomiting and diarrhea due to a Noravirus outbreak. To establish a mini-trust simply to facilitate your travel (and to encourage travel), seems a bit out of step with the current realities. Keep in mind that Cynthia and I have not discouraged travel and have paid all of your travel expenses out of your SNT. And yes, the SNT can pay for a certified travel assistant, if necessary. Since your sibling shave each inherited \$475,00 from our parents, they can serve as travel companions, but should not, in my opinion, be reimbursed for their own travel expenses.

Cynthia and I have discussed SNT issues with you till we are blue in our face. You seem unable (or unwilling) to commit to back away from the lawsuit. Is this because you feel that Anne Wolfe has something to gain (access to more money)? Possibly so.

To sum it up, the current lawsuit has been a financial disaster for your SNT, and has further fractured (possibly permanently) personal relationships in the Wolfe family, with no real end in sight.

I encourage you and all other family members to endorse putting an end to this legal non-sense and chose a new pathway for resolving differences of opinion. Family discussion, without the legal cost of \$350/hour tacked on.

Think about it.

Chris

Hal Wolfe <runlikehal@yahoo.com>

To: christopher wolfe, Chris Wolfe

Cc: Joel Wolfe, Susan & Joel Wolfe, Alan Wolfe, Anne Wolfe

Sun, Oct 9 at 9:42 PM

Hello Chris - the suggestion that any "family discussion" on this issue with you and Cynthia (or any other family members) would result in anything other than a rigorous (and likely more hostile) status quo (of which I found to be badly bent and broken in a number of serious regards before I ever initiated the law suit) I find to be a naïve notion at best.

The fact that you and Cynthia both seem to feel that resorting to some 11th hour wrangling with stern calls and notes to Anne and myself just prior to court-ordered mediation sessions will come to any productive outcome when you have nothing substantive to offer regarding the numerous issues I have raised, is very discouraging.

As to whatever is going on in your world, I suggest you reconsider how you manage whatever degree of frustration and anger that this suit apparently is unfortunately causing you, and try to realize that it is not easy for others (Anne in particular), and endeavor to be more respectful of Anne's emotionally vulnerable nature which has been exacerbated by her current health situation.

Hal Wolff

christopher wolfe <clwolfe@comcast.net>

To: Hal Wolfe

Cc: Anne Wolfe, Alan Wolfe, Joel Wolfe, Susan & Joel Wolfe, Cynthia Wolfe

Mon, Oct 10 at 10:55 AM

Hal,

Your lawsuit has resulted in serious money spent on legal fees for no useful purpose.

After reading your latest "proposal" regarding a mini-trust, Cynthia and I both realized that this is unacceptable to us. Furthermore, it doesn't serve any useful purpose. We, as trustees, have always paid Anne's travel expenses, promptly, once receipts were submitted.

What is clear to me (us), is that we are in for a prolonged legal process that will further divide the family and further drain Anne's SNT with unnecessary legal fees. We have already spent around \$40,000 by my estimation. This is not what our parents intended for their hard earned money to be wasted.

Most families do not resort to suing other family members over differences of opinion. I hope that we can consider other means of conflict resolution, other than costly lawsuits. With your latest proposal, it is very clear that the minitrust concept is a no go for us.

Anne has stated that she has tried many times that she was not able to talk you into stopping this lawsuit. She has also said to me that your lawsuit is not really about her SNT, but about long standing, deep seated anger. She has said that your lawsuit was actually a way for you to sue me for these other reasons. This sounds like "undue process" to me. Could you please comment and clarify?

This family needs to stop paying lawyers for fruitless endeavors.

Chris

Susan & Joel Wolfe <puzwolfe1@gmail.com>

To: christopher wolfe, Hal Wolfe

Cc: Anne Wolfe, Alan Wolfe, Joel Wolfe, Cynthia Wolfe

Mon, Oct 10 at 7:49 PM

Hal,

I doubt that you are truly as altruistic as you try to seem, and suspect that money has all along motivated you regarding this suit. I feel as such, that you have put Anne in a very difficult spot.

I suspect, based on the initial Zoom discussion, that your hope was to be named executor/trustee of Anne's SNT. I can only imagine that the investment strategy would have changed from dividend stocks to real estate with an "investment cottage" built on your land on Lake Charlevoix in the name of the trust. I also wonder if the mini-trust, in the amount proposed, is not an attempt to void Anne's disability status and thus have her (and you) gain control of the SNT funds. Along this line, I am aware of Alan (and possibly also you) somehow in the past having the audacity to claim that Anne was not Schizophrenic and therefore did not need to take her medications, likely a previous attempt to have her SSI status rescinded in an effort to gain direct control of the SNT funds. Obviously, neither Alan or you are mental health experts and I suspect that the pressure put on Anne to stop taking her meds was criminal abuse or assault. Also, if she were no longer considered disabled, she could lose her Medicaid.

While your insurance “expert” was correct that Medicaid pays for a nursing home, you did not know or foresee that it does not pay for assisted living and it seems most likely that Anne will need this, possibly sooner than later.

While a SNT can pay for travel companion(s), it seems obvious to me, that Anne is becoming less active and that her travels will be more limited in the future. It is commonly said that in retirement regarding travel there are the go-go years, the go-slow years and eventually the no-go years. It seems very unlikely that the long list of proposed trips will ever occur.

Hal, you were wrong about the SNT’s accounting, wrong about the generally accepted more conservative recommendations for trust/retirement savings investment strategies near and after retirement age (there was no financial malpractice as alleged by you), wrong that Medicaid will provide Anne with all the care she is likely to need and likely wrong about Anne’s future travel.

I suspect you have exploited the natural friction between an adult with special needs and their family member SNT trustee and have rolled the dice on your lawsuit because you are seeking a financial reward, whether being named trustee of Anne’s SNT or at least the recipient of travel paid for by the SNT. Your behavior is not benevolent, but selfish and caustic and has caused unnecessary pain and suffering to your (?former) family and considerable unnecessary expense to the SNT. The change of your first and last name suggests that you no longer consider yourself a member of the Wolfe family. If so, MYOB.

Joel

PS With Anne’s current fight to be cured from breast cancer, Anne would be best served by eliminating all unnecessary stress in her life. This lawsuit continuing will not reduce her stress. I suggest that you stop “stirring the pot” and support Anne and those who are truly trying to act in her best interest. An example of your self centeredness is the oven in Anne’s condo. Despite all the times that you have stayed cost free in her condo, you never attempted to clean her oven and with or without your encouragement, she wanted the oven replaced instead of simply getting it cleaned. I have a 25 year old oven in our Colorado condo; we clean it occasionally but do not have plans to replace it as it works just fine. As far as any upcoming mediation, unless it is binding, it is a waste of time and money. I think it would be best for you to realize that you have wasted a lot of all of our time and too much of Anne’s SNT money.
(conclusion of 10-10-22 note from Joel Wolfe)

ALAN WOLFE <al35wolfe91@comcast.net>

To: Susan & Joel Wolfe, christopher wolfe, Hal Wolfe

Cc: Anne Wolfe, Joel Wolfe, Cynthia Wolfe

Tue, Oct 11 at 3:02 AM

Conspiracy theories and demeaning comments are not constructive contributions to this discussion. My belief that Anne's initial mental health crisis while in high school was something other than schizophrenia is well-founded and I will have more to say on the subject soon.

Alan

puzwolfe1@gmail.com

To:ALAN WOLFE,christopher wolfe,Hal Wolfe

Cc:Anne Wolfe,Joel Wolfe,Cynthia Wolfe

Tue, Oct 11 at 3:18 AM

Alan,

I just tried to call you but you did not have the guts to pick up. I understand that you conveniently generated an email leaving a paper trail of your past behavior. I am not sure that without being a physician, let alone a psychiatrist, that any opinion you have regarding Anne's mental health diagnosis is helpful. I did not suspect that you also have a financial motivation for continuing Hal's lawsuit, but maybe you do. You and Hal are very disrespectful of our parents, who set up and funded the trust. It probably deserves repeating, that Mom said less than 48 hours before she died, that she did not trust Hal.

Enough said, Joel

ALAN WOLFE <al35wolfe91@comcast.net>

To:puzwolfe1@gmail.com,christopher wolfe,Hal Wolfe

Cc:Anne Wolfe,Joel Wolfe,Cynthia Wolfe

Tue, Oct 11 at 4:37 AM

"I did not have the guts to pick up" - another conspiracy theory. I was (and still am) in my office (where Chris called me this evening and I did pick up, as he can confirm).

Alan

puzwolfe1@gmail.com <puzwolfe1@gmail.com>

To:ALAN WOLFE,christopher wolfe,Hal Wolfe

Cc:Anne Wolfe,Joel Wolfe,Cynthia Wolfe

Tue, Oct 11 at 7:01 AM

Who are you, Trump? Absolutely ridiculous and nonsensical.

(Joel's reply to Alan's response)