

christopher wolfe <clwolfe@comcast.net>

To: Anne Wolfe

Cc: cynthia wolfe, Hal Wolfe, joel Wolfe, Alan Wolfe, Susan & Joel Wolfe

Thu, Apr 14 at 9:43 AM

Anne,

We are being sued about our performance as Trustees to your Special Needs Trust. It appears that you may be linked to this lawsuit.

If the lawsuit is not resolved and moves forward, it may be very expensive. This was disclosed to both you and Hal at the initial virtual meeting that we had with you, Hal, Joe Weiler and Hal's lawyer.

I have repeatedly appealed to Hal, you and all family members that any disputes be handled without an expensive law suit.

The funds of the Trust are being utilized to defend the Trustees. This is standard.

Chris

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**Hal Wolfe** <runlikehal@yahoo.com>

To: Chris Wolfe, Cynthia Wolfe, Anne Wolfe, ALAN WOLFE, 'Susan Wolfe'

Wed, Apr 20 at 11:00 AM

Hello Chris and others. Chris, your matter-of-fact characterization of this situation is remarkable. There is very little about Anne's Trust that is standard. Certainly not the Trustee list or the behavior of the current Trustees. Having an in-law as a co-Trustee is far from standard. Further, having a clause that was embedded by the person who was the primary Trustee, to install his wife in as a permanent co-Trustee to remain even if the original Trustee were to die, that is so far from standard that my lawyer has never even heard of it. And having two family Trusts totally re-written based on the patently false pretense that the wealth and healthcare needs of family members was put into jeopardy (purportedly based on my actions while earnestly managing our Charlevoix property) was such a ridiculous farce as to be laughable – except for the fact that you successfully used that justification to cajole your mother into agreeing to allow you to make the same husband & wife co-Trustee change you desired before your father died, but were not successful in implementing at that time. But through time and chance you saw an opening when your father was gone, at a time when you were upset and your frail and aging mother was 91 years old and who's health was slowly failing. Your mother needed and deserved peace, harmony and companionship but you swooped in from the West Coast and with anger, divisiveness and duplicity. By God Chris - there was nothing standard about that situation or the Trusts that resulted.

The outcome of that is the person now acting as the primary Trustee for Anne's Trust is ill-suited to deal with Anne and her quirks, as illustrated by the repeated public and

private outbursts Anne has been subjected to. Anne herself has indicated that she finds her current primary Trustee difficult to deal with, but that seems to have fallen on deaf ears and you'd have us all believe that me and my lawsuit are the only problems. Further, you personally deny that the years-long failure to provide any accounting of the Trust was anything more than minor lapse – in your own words, “The yearly accounting was late in getting out.” Yes, four years late, and totally delinquent of standard protocol as required by law and by the Trust itself. In contrast, when I was 1-2 years late in requesting a reimbursement for \$900 of my hard-earned money that I spent to allow Anne to travel and visit her relatives, at a time that I then was enduring extensive treatment for cancer, you made it clear that you would not approve of any reimbursement after such a delay. I got payment only after submitting a spread sheet, credit card receipts, threatening litigation and dodging your attempts to coerce a dog boarding fee be paid to Anne. It seems like you have one set of standards for yourself, but a apply different one to the rest of us.

Further, your failure to acknowledge any culpability in the alteration of the Trust and subsequent issues with Trust management and certainly with the record keeping is telling by itself, but your current stance that you are willing to squander up to 100 grand of Anne's Trust to defend your honor and status as Trustees is appalling. What magic potion do you feel that you have to offer Anne and her Trust that you would choose to threaten such financial risk to her to defend yourself? Your high standards? Honestly, it appears to me that you feel some sort of strange entitlement to the role of Trustee as if it is a divine, first-born, birth-right that you alone uniquely possess, but that just ain't so. As far as I can see, you and your partner have brought nothing special to the role of Trustees that anyone else in the family couldn't provide. And how perfectly ironic that you appear so willing to inflict the exact same harm to Anne that you callously (and falsely) accused me of 6 years ago when you steam-rolled you aging mother (and trusting sister) into agreeing to create the Trust that you now so staunchly defend. You professed to defend her interests then, and now you casually threaten to harm them because you say it is standard. Further belligerence is displayed in the manner in which you publicly forwarded what Anne obviously intended to be private note to you, as you have done to Alan and myself previously. You betray Anne's personal trust openly and brazenly, yet expect to continue to serve as her Trustee.

So to wrap up my heartfelt and overdue diatribe, I have a suggestion for you Chris - **instead of using the threat of legal expenses like a hammer using Anne as a sacrificial pawn and naming me as your scapegoat, if you really want to resolve things without an expensive lawsuit, why don't you consider brandishing a dose of humility, and consider stepping down gracefully and let others take over as Trustees?** It seems evident that neither of you have the desire nor the temperament to actually perform the work that is required to support Anne, yet you both, or more accurately Cynthia (to her credit) has labored for years in a capacity that neither of you appear particularly well suited for. That might be laudable if the role was thrust upon you and there was no one else to take the reins, but that is not the case here – in fact far from it. So instead of standing on your soap-box and exposing Anne to financial (and emotional) duress as a standard protocol, why not do the upstanding thing and

give someone else a chance to step up. You hand-picked Joel and Susan as your successors. How about giving them the opportunity to lift this burden from you. Do that and I'll drop the lawsuit – but I made that offer months ago, so I'm not overly optimistic, but I will continue to hold out hope. That's my honest take. Good day all.

**Hal**