

Anne Wolfe Mini-Trust 2023 Summary Report

February 21, 2024

Things accomplished for (and by) Anne in 2023 (names in “()” indicate who accomplished the action):

- 1) Microwave oven (purchased by Anne) is installed (Hal)
- 2) New induction top oven purchased and installed (Hal - March)
- 3) Mini-Trust finalized with Alan as Trustee (funded on May 19 by Trust) (Hal & Alan)
- 4) ABLE account established and funded with \$200 (Alan) & oven reimbursement (Alan)
- 5) Living room re-arrange completed (Hal - June)
- 6) Visit to Charlevoix by Anne, Alan & Hal (July)
- 7) Home visits from Cindy Lowery initiated – 7 visits made (Hal)
- 8) Life Alert style pendent with fall detection set up (Alan)
- 9) Attended HOA meeting – contact with various neighbors established (Hal)
- 10) HOA rules verified and door mat back in front of Anne’s front door (Hal)
- 11) G-Mail ID reset completed and other computer repair initiated (Alan)
- 12) MS Defender anti-virus software installed on MacBook and various other updates (Alan)
- 13) New file cabinet purchased and installed (and old ones removed) (Anne, Hal & Alan)
- 14) New showerhead purchased and installed in upstairs bathroom (Anne & friend)
- 15) Thanksgiving visit by Alan & Hal, and friends’ w/turkey dinner at Anne’s place (Hal, Anne & Alan)
- 16) Back deck loose paint scrapped and wood evaluated (Hal)
- 17) Tracked Covid and other vaccine status (flu, RSV, pneumonia) and update appointments (Alan)
- 18) Visit from Cousin Annie (*funded by mini-Trust but was challenged & reversed*) (Hal & Annie, Dec.)
- 19) Garage door doorknob replaced (Hal)
- 20) Visit to Independence Village conducted (and contact with the Youngs who live there) (Hal & Anne)
- 21) Visit to (Midland Senior Services) Seasons Adult Day Services setup and made (Hal & Anne)
- 22) New radio and phones purchased and installed; also printer table built (Hal)
- 23) Christmas visit by Hal, and friends’ dinner (Cornish Hens) at Anne’s place (Hal & Anne)

Money supplied to the mini-Trust:	\$6,200 (May)
Money spent from mini-Trust:	\$3,872
Money spent on Annie’s trip:	<u>\$1,085</u> (\$885 for air, & \$280 for ground/water)
Money used for Anne’s benefit:	\$4,957
* Money returned to Trust:	\$1,085
Money left over from 2023:	\$2,328
Money added to Trust for 2024:	<u>\$10,320</u> (in Dec.)
Mini-Trust balance as of 1/1/24:	\$12,648