

## **Reasons I initiated the lawsuit vs Chris as Trustee for Anne**

- 1) I feel that Chris & Cynthia are not properly managing Anne's Trust in many ways. (Investing, lack of reporting, bullying Anne (& me), lack of support for Anne, forcing their will regarding purchases, etc)
- 2) I feel that they could do more to support Anne's lifestyle with travel and with support of modest monthly purchases and / or an "end of the month" relief fund similar to what her parents used to provide when they were alive and Anne ran short until her next paycheck arrived.
- 3) I wanted to find out what was going on with the Trust investments, and how it was being managed.
- 4) I feel they tend to use the Trust serve their own needs and use it to enforce their will, and in the process, they use their position as Trustees to bully and intimidate both Anne and myself.
- 5) I know that the current arrangement of Trustees is what Mom and Dad originally intended. (And how the current situation was created was very dubious – mom and Anne were both taken advantage of.)
- 6) I feel that the Trustees treated mom badly towards the end of her life. (They pushed a new filing system on her, took checks from her check book which caused them to bounce, then used that as part of the justification to permanently extract her checkbook from her, one eventually even threatened her over the phone, and near the end I'm told they were trying to strip her of all of her control of her entire estate.)
- 7) I felt that Chris did some things very poorly with the prior Trust he managed - Mom & Dad's estate.
- 8) I feel that Chris owes it to the entire family to account for his actions in public, specifically telling the truth while under oath.
- 9) I wanted to set an example for myself and for the family that Chris must be held accountable for his actions, that he is not above reproach, and that he can be confronted if he behaves inappropriately, which I feel he very much has (and for years regarding control of both family Trusts – being misleading (or outright lying) to his father, to his mother & sister, and about me and my actions regarding Charlevoix.)
- 10) I want to see if the Justice System can help support Anne and help find a solution to her Trust situation that Chris and Cynthia won't consider. They won't budge on anything as they seem to think they've done everything properly. Their unyielding nature and consequent abusive behavior directed at Anne should be evident to the Court. (It's like a cancer – it's entirely unhealthy for her.) Of course, they blame me. And why not, I'm the rabblouser. I initiated the lawsuit, so I make a convenient target.

### **In summary, I feel there are now 3 primary reasons I feel this lawsuit is necessary:**

- 1) The current Trustees have (in my opinion) failed in many ways to appropriately support Anne.
- 2) The Trustees use the Trust as a bully pulpit and for the past year have taken to lashing out at Anne and in so doing inflict psychological abuse upon her. (To be clear, the caring, custodial relationship between Cynthia and Anne is totally broken, and is now rife with abuse of Anne.)
- 3) The current Trustees are clearly a poor fit in their role of Trustees, but based on some sense of pride, honor or obligation (or possibly even a personal vendetta against me) they are not willing to consider any changes to the current situation. To put it simply, and rather bluntly (with an appropriate metaphor), they are the Wardens of Anne & her Trust and feel they can do as they darn well please with her Trust and by golly they expect to keep it that way no matter what.

Hal Wolfe  
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