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To:	Richard Kahn	Company:	HBRK Associates Inc.
From:	Deborah Pechet Quinan, Esq.	Fax:	[Redacted]
Date:	November 3, 2017	Telephone:	[Redacted]
Pages (including cover page):	5	Our File No:	[Redacted]
Re:	Chomsky		

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Comments:

Please see attached as requested. Thank you.

Jayne L. Mahoney, Paralegal



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## Account summaries

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From: [REDACTED] <[REDACTED]>  
To: Deborah Quinan <[REDACTED]>

Oct 19, 2017, 12:01:05 PM

Good morning Deborah –

[REDACTED] now sending along to you the summary information with respect to the Carol S. Chomsky Non-Exempt Marital Trust and the Carol S. Chomsky Exempt Marital Trust. Please let me note a few aspects, as follows:

1. As you'll see, there is a one page summary for each of the trusts which shows, year by year, sources of income and items of expense, as well as distributions made to or on behalf of Noam. We have broken out income into the categories we thought most likely to be of use and have likewise broken out expenses among typical categories.
2. The third sheet that I've attached aggregates the income and expense information for both trusts and provides a Trust Accounting Income analysis, with comparison of that income to actual distributions for each year.

I hope you'll find that these reports give you, Noam and Valeria the information that you're looking for, but I'll be standing by to answer questions, of course. If you wish I can also provide you with copies of the underlying account statements, bearing in mind that those run to several thousand pages.

As I mentioned in our exchanges yesterday, I'll be out of the office through October 30. On my return I anticipate being called as a witness in a trial, but the trial schedule is still up in the air, so my availability during the week of the 30th may be spotty. Please bear with me.

Thanks,

Max

A. Max Kohlenberg  
Howland Evangelista Kohlenberg Burnett, LLP



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[REDACTED] 11/3/2017

EFTA00589979

## Carol S. Chomsky Non-Exempt Marital Trust

## Summary

Year	Dividend Income	Interest	Municipal Income	Trustee Fees	Tax Prep Fee	Legal Fees	Real Estate Taxes	Investment management fees	Margin Interest	Beneficiary Distributions
2010	2,561.73		673.51	618.38			3,467.24			27,680.74
2011	5,854.73		3,716.64	5,064.04	954.75	3,947.87				65,000.00
2012	5,634.29		2,369.32	2,186.41	752.00	-				65,000.00
2013	5,105.12		1,770.21	1,954.77	1,064.00	-				73,236.92
2014	4,954.35		1,770.21	1,735.81	491.00	-				70,000.00
2015	4,824.12	0.05	-	895.52	-	-		1,439.00		60,000.00
2016	2,651.71	0.62	-	-	1,450.00	2,304.31		1,636.00	17.74	60,000.00

## Carol S. Chomsky Exempt Marital Trust

Summary											
Year	Dividend Income	Interest	Municipal Income	Other Income	Trustee Fees	Tax Prep Fee	Legal Fees	Real Estate Taxes	Investment management fees	Margin Interest	Beneficiary Distributions
2010	8,069.84	135.29	1,075.95		298.28			2,682.42	7,277.00		94,909.00
2011	14,721.05	20.19	3,213.02		8,464.44	786.75	487.75	5,508.30	6,880.00		
2012	19,185.79	19.67	4,320.79		9,065.79	751.25			8,462.00		
2013	24,927.32	3.89	9,438.54		9,334.55	1,689.00			8,389.00		
2014	26,503.50	5.19	7,336.89		5,718.57	517.00			14,507.00	4,177.00	
2015	26,876.73	20.49	4,946.53	13.86					23,252.00	4,907.81	
2016	32,064.61	2,155.12	18,362.50			3,250.00	2,485.00		26,396.00	42.85	

## Carol S. Chomsky Non-Exempt Marital Trust and Carol S. Chomsky Exempt Marital Trust

## Summary

	2010	2011	2012	2013	2014	2015	2016
Exempt Share TAI	2,654.05	4,136.48	14,388.96	24,663.47	21,385.79	17,777.70	36,495.30
Non-exempt Share TAI	(1,314.85)	4,588.05	6,534.06	5,301.06	5,570.41	3,656.91	(51.60)
Total TAI	1,339.20	8,724.53	20,923.02	29,964.53	26,956.20	21,434.61	36,443.70
Beneficiary Distributions	122,589.74	65,000.00	65,000.00	73,236.92	70,000.00	60,000.00	60,000.00
Distributions over TAI	(121,250.54)	(56,275.47)	(44,076.98)	(43,272.39)	(43,043.80)	(38,565.39)	(23,556.30)