

From: "jeffrey E." <jeevacation@gmail.com>

To: Valeria Chomsky <[REDACTED]>

Subject: Re: Re:

Date: Tue, 02 Jan 2018 17:23:36 +0000

send max a note , asking for his list of trustees.

On Tue, Jan 2, 2018 at 10:57 AM, Valeria Chomsky <[REDACTED]> wrote:

What do you think? Should we meet before with Harry?

This is the lawyer we are going to hire in AZ because she is also licensed in MA.

Coincidentally, she was contacted by Max to become a trustee to replace him in the marital trusts. She realized Max was talking about us. We haven't mentioned any of the Trusts' problems, so I'm assuming Max mentioned to her. Assuming also Max presented his version.

----- Forwarded message -----

From: <[REDACTED]>

Date: Tue, Jan 2, 2018 at 1:30 PM

Subject: RE: Re:

To: <[REDACTED]>

Cc: <[REDACTED]>, <[REDACTED]>

Happy new year - I know you're not quite back yet, but neither am I. I'm looking at January 22, 23 or 24 late morning to meet at your home. Do any of those dates work for you? It will be important for me to see copies of the trust(s) in advance of our meeting. Best, Shari

Shari Levitan | Holland & Knight

Private Wealth Services | Chair – New England

Holland & Knight LLP

[10 Saint James Avenue, 11th Floor | Boston, MA 02116](#)

Phone [REDACTED] | Fax [REDACTED]

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From: Noam Chomsky [mailto:[REDACTED]]

Sent: Wednesday, December 20, 2017 1:20 PM

To: Levitan, Shari A (BOS - X71405) <[REDACTED]>

Cc: Valeria Chomsky <[REDACTED]>; Savage, Stephen M. <[REDACTED]>

Subject: Re:

Thanks for handling it this way. Just right.

We're back in Tucson from January 5, and will be there from then on, occasional days away. So whatever is convenient for you.

Noam

On Wed, Dec 20, 2017 at 6:58 AM, <[REDACTED]> wrote:

Dear Noam and Valeria,

I had a call from Attorney Max Kohlenberg, unsolicited. He was calling to determine whether I might be able to serve as trustee of a marital trust and he began to describe the situation. I stopped him as I thought he was describing your situation. He is now aware that we plan to meet in January, but nothing else. He seemed glad that you were thinking of having local representation.

Shall we set a date to meet? Best, Shari

Shari Levitan | Holland & Knight

Private Wealth Services | Chair – New England

Holland & Knight LLP

[10 Saint James Avenue, 11th Floor | Boston, MA 02116](#)

Phone [REDACTED] | Fax [REDACTED]
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From: Levitan, Shari A (BOS - X71405)

Sent: Tuesday, November 28, 2017 4:22 PM

To: [REDACTED] <[REDACTED]>; [REDACTED]
<[REDACTED]>

Cc: 'Savage, Stephen M.' <[REDACTED]>; Bennett, Denise M (BOS - X75810)
<[REDACTED]>

Subject:

Dear Noam and Valeria,

It was a pleasure to speak with you briefly yesterday from the Phoenix airport on my way back to Boston. As we discussed, you plan to send me copies of the estate planning documents you have, any emails, and make email introductions to various individuals you'd like me to contact for additional information. My assistant, Denise Bennett, will prepare an engagement letter for estate planning, and we will look for a date in mid to late January for me to visit with you in Tucson. Best regards, Shari

Shari Levitan | Holland & Knight

Private Wealth Services | Chair – New England

Holland & Knight LLP

[10 Saint James Avenue, 11th Floor | Boston, MA 02116](#)

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Valeria Chomsky

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