

From: "jeffrey E." <jeevacation@gmail.com>
To: Richard Kahn <[REDACTED]>
Subject: Re: Questions
Date: Thu, 30 Nov 2017 12:59:21 +0000

Send to Deborah

On Thu, Nov 30, 2017 at 7:24 AM Richard Kahn <[REDACTED]> wrote:

Richard Kahn
HBRK Associates Inc.
[575 Lexington Avenue, 4th Floor](#)
[New York, NY 10022](#)

tel [REDACTED]

fax [REDACTED]

cell [REDACTED]

Begin forwarded message:

From: Max Kohlenberg <[REDACTED]>
Subject: Questions
Date: November 30, 2017 at 6:02:12 AM EST
To: 'Richard Kahn' <[REDACTED]>
Cc: 'Harry Chomsky' <harry@chomsky.net>

Dear Rich –

Following up on our call on Monday I have reviewed this matter with my trust committee partners once more, and we are in agreement that the following questions are those which we'd need answered to properly evaluate a request for a principal distribution to Noam from the Carol S. Chomsky Exempt Marital Trust or the Carol S. Chomsky Non-Exempt Marital Trust (hereinafter "the Trusts") allowing us to take into consideration Noam's resources and needs and the part the Trusts should play in meeting those needs:

1. What is the balance in Noam's IRA?
2. What was Noam's RMD in each of the last 3 years and what were his actual withdrawals?
3. What other sources of income does Noam now have (including investments, lecture fees, royalties and teaching salary)?
4. What has the annual income been from those other sources in the last three years.
5. What other assets does Noam have (including non-income producing assets, such as interests in real estate)?
6. What are Noam's debts, including any taxes not paid?

7. What gifts or other payments to third party has Noam made in the last 4 years? (including transfers of copyrights)?

8. What have Noam's annual expenditures been for each of the last 4 years (including tax obligations) and what are his anticipated annual needs going forward.

Please understand that we are open to discussing the scope and particulars of these questions before they are addressed. Please also understand that answers that are provided may lead to additional questions if we feel some of the answers need to be clarified.

Thank you,

Max

A. Max Kohlenberg
Howland Evangelista Kohlenberg Burnett, LLP
One Financial Plaza – Suite 1600
Providence, Rhode Island 02903

Direct: [REDACTED]

Main: [REDACTED]

Fax: [REDACTED]

[REDACTED]

[REDACTED]

This email and any attachments thereto are intended only for use by the addressee(s) named herein and may contain legally privileged and/or confidential information. If you are not the intended recipient of this email, you are hereby notified that any dissemination, distribution or copying of this email, and any attachments thereto, is strictly prohibited. If you have received this email in error, please immediately notify me by return email and permanently delete the original and any copy of this message or attachment. Thank you.

--

please note

The information contained in this communication is confidential, may be attorney-client privileged, may constitute inside information, and is intended only for the use of the addressee. It is the property of JEE

Unauthorized use, disclosure or copying of this communication or any part thereof is strictly prohibited and may be unlawful. If you have received this communication in error, please notify us immediately by return e-mail or by e-mail to jeevacation@gmail.com, and destroy this communication and all copies thereof, including all attachments. copyright -all rights reserved