

**TAB 58**

*Lucinda Harpelle*

County Clerk Harris County, Texas



412249-401

91204:0201:51021180 08112015:1020:PO216

EXHIBIT

A

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08/12/2015 10:20: P0217

### PM TRUST REVIEW MEETING

Signing Date & Time
Wed. Aug. 4th
2 pm
Fee: _____
Paid: _____ Mail: _____

Client Name: Brunsting, Nelva

Date: 07/30/10 Estate Size: 2 mil±

IRA: Husband - N/A Wife - \_\_\_\_\_

Current Address/Phone: 13630 Pinelock Blvd TX 77079

Date of Trust/Restatement: \_\_\_\_\_ Previous Amendments? Yes.

Subtrust Funding Done previously? Yes. DT & ST.

AMENDMENT:  QBD(PAT)  Other  Instr Ltr  HCPOA

ApptSUCCTec/HIPAA  EXTPOA  COT  POA  DIR

Arita Kay Riley & Arny Ruth... Co-trustees  
or Successors of them. Then Trust

Distribution Change (QBD):

PAT QBD

**IF PAT QBD then:**

Each beneficiary Trustee of Own Trust:  yes  no

except for Carl, Arita & Arnie as Co-trustees for Carl  
(except they have it to name, Carl as admin)  
Distribution of PAT: lead to Lowr Succ Tee

Same as LT except need language  
about the last amend (QBD) also early distr.

V&F 000687

*Lucas M. Hays*



*Lucas H. Hight*



09112015:1020:PO218

Specific Distribution: \_\_\_\_\_  
\_\_\_\_\_

Ultimate Distribution: \_\_\_\_\_  
\_\_\_\_\_

**HEALTH CARE DOCUMENTS:**

1<sup>st</sup> Agent: Carol  
\_\_\_\_\_  
\_\_\_\_\_

2<sup>nd</sup> Agent: Anita  
\_\_\_\_\_  
\_\_\_\_\_

3<sup>rd</sup> Amy  
\_\_\_\_\_

IRA TRUST:  yes  no For whom?  husband  wife

Trustees upon disability of Trustor or spouse: \_\_\_\_\_

Each beneficiary Trustee of own trust?  yes  no

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SS# of Surviving Spouse/Beneficiaries: \_\_\_\_\_

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V&F 000688



*Laura M. Harrell*



512041020151021180

**FUNDING:**

Real Estate \_\_\_\_\_

Which property has NO MORTGAGE? \_\_\_\_\_

- \_\_\_\_ Recording HS Deed
- \_\_\_\_ Apply for HS Exemption

Tax-deferred Assets \_\_\_\_\_

- |                                |                                   |
|--------------------------------|-----------------------------------|
| ____ Bank & Brokerage Accounts | ____ Safe Deposit Box             |
| ____ Life Insurance            | ____ Stocks and Bonds             |
| ____ Oil & Gas Interests       | ____ Motor Vehicles               |
| ____ Credit Union Accounts     | ____ Sole Proprietorship Assets   |
| ____ Partnership Interests     | ____ Promissory Notes & Mortgages |
| ____ CDs                       | ____ Annuities                    |

Additional Documents: \_\_\_\_\_

**NOTES:**

Needs new DFPOA order

Anita

Carol

Amy

\_\_\_\_\_

\_\_\_\_\_

Any Name Changes for children? \_\_\_\_\_ Any children Predecease? No.

If Yes, who: \_\_\_\_\_

V&F 000689

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0220: P020: 1020: 51021599

FEES:  
QUOTED: \$ \_\_\_\_\_ (Plus Expenses)  
AMOUNT REC'D: None DATE: \_\_\_\_\_  
BALANCE DUE: \_\_\_\_\_  
DOCUBANK? \_\_\_\_\_

Cost per QBD 1200.  
Hippa Pkg 250 - med POA  
D.F.P.O.A 150.-  
Appt. of Succ TEE  
New Card.  
Courtesy discount \$150.-  
Cuj

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*Shirley H. Hight*



09112015:1020:PO221

Anita - called  
Carl has resealed  
amendments to trust

Anita + Aimée as Co-tees

Change list under ME

- Carol
- Anita
- Aimée

financial P.O.A.

- Anita
- Carol
- Aimée

Amend to trust / PAT's w/ Aimée  
to correct Supp Needs to be  
 Anita  
 Co-tees.  
 sp needs?

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V&F 000691



*Linda Harrell*



From: Anita Brunsting  
To: Candace Freed  
Sent: 10/6/2010 8:19:06 PM  
Subject: Brunsting Family Trust

Candace,

I spoke to mom tonight and she agreed to resign as trustee and appoint me as trustee. I told her that you would be contacting her to re-explain things and make sure she understood what was happening.

If you have any questions, my cell is 361-550-7132.

Thanks,  
Anita

06/23/2022 10:20: P0222

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V&F 001277







I, Teneshia Hudspeth, County Clerk of Harris County, Texas certify that these pages are a true and correct copy of the original record filed and recorded in my office, electronically or hard copy, as it appears on this date.

Witness my official hand and seal of office  
This June 23, 2022

Teneshia Hudspeth, County Clerk  
Harris County, Texas

Confidential information may have been redacted from the document in compliance with the Public Information Act.

