

08112015:1020:P0216

EXHIBIT

A

COPY

UNOFFICIAL

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 Hwy TX 77079

Date of Trust/Restatement: _____ Previous Amendments? Yes.

Subtrust Funding Done previously? Yes. DT & ST.

AMENDMENT: QBD(PAT) Other Instr Ltr HCPOA

ApptSUCCTee/HIPAA ExtPOA COT POA DIR

Anita Kay Riley & Army 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, Anita & Armie as Co-trustees for Carl
(except they have rt to name Carl as admin)
Distribution of PAT: need to Low Succ Tee

Same as LT except need language
about the last amend (QBD) less early distrs.

08/12/2015:1020:P021B

____ Specific Distribution:

____ Ultimate Distribution:

HEALTH CARE DOCUMENTS:

1st Agent: Carol

2nd Agent: Anita

3rd 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: _____

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 DFPDA order

Anita

Carol

Amy

Any Name Changes for children? _____ Any children Predecease? No.

If Yes, who: _____

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FEES:

QUOTED: \$ _____ (Plus Expenses)

AMOUNT REC'D: None DATE: _____

BALANCE DUE: _____

DOCUBANK? _____

Cost per QBD 1200.

Hipaa Pkg 250 - med POA
D.F.P.O.A. 150.-
Appl. of Succ TEE
New Card.

Courtesy discount \$150.-

Cy

Anita - called
Carl has encephlytus
amendments to trust

Anita + Aimee as Co-tees

change list under ME

Carol
Anita
Aimee

financial P.O.A

Anita
Carol
Aimee

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

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

08/11/2015 10:20: P0222

V&F 001277