

Robin Liebowitz

From: "Merrie" <merrielib@yahoo.com>
To: <rdl4@mindspring.com>
Sent: Sunday, November 23, 2003 10:40 AM
Subject: Operation Justice for J

Hi Robin:

I spoke to Mom this morning. She is very much aware that the best hyperbaric center for Daddy is Florida. Mom thinks that you told her not to do the hyperbaric treatment and I keep reminding her that you told her not to take Daddy to the center in Great Neck because that center does not have capsules where the patient may sit upright. Then she suddenly remembered.

I do believe that it is somewhat possible to convince Mommy to take Daddy to Florida. What you might do is call Dr. Haller and ask him if Daddy would be able to fly to South FLorida. The flight is appropimate two hours and forty minutes.flying time.

Mommy does have to discuss this with Sharon to see if she would be willing to either find temporary work until Daddy came back or perhaps take some time off (if her family can afford it). She does take two weeks vacation from caring for Daddy when her husband takes his from his job. I believe that she did take her vacation in February of last year.

Regarding Chase and finding old checks, etc

- Go with Mommy to Charles (before 3:00pm). Tell Mommy that she herself had expressed an interest in finding out whether she paid for Janice's extension (not the one on her) and how much. Ask Charles how far back checks are kept on fiche or some other more updated archive medium.
- Images of checks between the years 1987-1992 should be recovered. **The backs of the checks are just as important as the faces of the checks because locations and states where the checks were cashed are stamped on the backs.**

If this process is not too difficult, checks between 1997-2000 should be recovered. Those were the years when Andy took a 40%+ paycut, Ari and David's Bar Mitzvahs took place as well as Ari's confirmation; and, Ari graduated highschool and went to Europe and Israel on Mommy. In addition to all the above, Ari, David and Noah went to summer camp. Mommy did pay for Ari's summer at Camp Lenox.

- Impress upon Mommy that Andy and Janice never had the earning power to pay for an extension on the house as well as the full bill for the boys' bar mitzvahs; that Andy had a civil service job and that Janice hardly ever worked. They could not have lived that fancy lifestyle without some subsidies.
- As a matter of fact, you might tell Mommy that Janice recently talked about dropping her PT license (even though PT professionals are gainfully employed, especially with medicare).
- You might also tell her that when Merrie suggested to Janice that she work for Medicare like the PTs who consulted with Daddy, Janice did not like doing the paperwork (even though paperwork is part of most professional jobs).
- Ask Daddy what he did with his settlement money.If he does not remember, perhaps you could jog his memory by suggesting, perhaps that he gave it to his grandchildren or, as he refers to them "the kids".
- If he cannot tell you, than call the Roslyn Savings Bank with Daddy next to you so that the customer service rep will not refuse to attempt to either reference any information about any past

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agreement or the POA (which I do not think she has)., she always has to play one of her cards in exchange for her cooperation.

In exchange for her affixing her John Hancock to the agreement, my mother had to give Noah his Bar Mitzvah gift of \$5,000. Yet, my mother does not do anything like that for me and Robin.

Any opportunity for Janice to manipulate my mother has to be removed by putting things in place. My mother should not have to check with Janice or Andy. Perhaps, you and Diane should stress to her that you both are her advisors and seek to do things in her best interests whereby, the three sisters will have to do things accordingly by written decree, such as the POA and the agreement.

If my mother's assets can be divided equally, there is nothing Janice can do about it because that is the norm and it is fair. I believe that the courts would agree to that!!!

Again, I suggest a one-on-one meeting with my mother to help to somewhat straighten her out and put things in place so that there there will be, if anything, a minimum amount of problems later on. It must be stressed to my mother that Janice is not an expert and that she already has made some mistakes, i.e., "advising" my mother not to set up an irrevocable trust and criticizing Diane for leaving my mother out of the POA, whereby, revoking what was originally setforth by my father.

Janice and Andy are out for themselves and not for my mother. I have been told by members of my extended family to watch Andy very carefully. Of course, that is not that easy for me because of where I live.

Janice and Andy are expected in Roslyn in the near future. I just wanted you to be prepared in the event of a phone call to meet with them and my mother.

Janice may also find out about the joint Schwab accounts that were set up to equalize what my mother gave to Janice in shares of the Fidelity Magellan Fund.

I believe that the reason why my mother gave you the go ahead to allocate 250K to each joint account was because of a year's worth of statements that my mother had asked Fidelity to send her regarding Janice's Magellan account. She most likely reviewed them in terms of what they were worth at different times.

Please let me know what you think.

Hope all is well with you and yours.

Regards,
Merrie

PS Should you wish to meet with me and my mother for any reason to discuss my parents' portfolios, etc., please do not hesitate to advise me.

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