

## Robin Liebowitz

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From: "Merrie" <merriemb@yahoo.com>  
To: <joanmhubr@aol.com>  
Cc: <rdl4@mindspring.com>  
Sent: Wednesday, February 04, 2004 7:13 AM  
Subject: Coming to NY on Feb. 22 - but others may come before me

Dear Joan:

Yes, I am coming to NY in 3 weeks. But prior to that, Janice and her husband are coming to Roslyn soon. Andy normally never comes.

Janice forewarned me that she was going to ask my mother to allocate some funds to her children like what my Grandmother did. I believe that Robin and/or I told you about all of that.

At any rate, should they want a meeting with you and/or Diane, I feel that you should meet with my mother only, preferably after they leave. I believe that it would be better for you and my mother to have a one-on-one meeting regarding the best, equitable way to handle her estate affairs so that the family does not implode.

The bottom line is that my mother must be made to realize that just because one daughter found her soulmate at a young age and was in good health to bear 3 grandchildren while, the lives of the other two took a different path, this does not mean that the daughter who bore the children is entitled to more. **Whatever my mother may have in mind to allocate to the grandchildren, should that come up, should come out of Janice's third.** This can easily be done, as you have said, by splitting assets up 3 ways, where part of Janice's share goes to her children.

### **This is only fair!!!!**

Perhaps you may be able to draw from similar situations of previous clients about what happens when parents show financial partiality (let alone emotional partiality) to one child for whatever reason it is (except of course being that one children has medical problems and / or disabilities which require custodial care).

The outcome of not being equal with all one's children is very unpleasant. I have seen it happen with members of my extended family where siblings spend their lives not talking to each other.

My neighbor here in Boca Raton is in a stormy court battle with her sister because her sister was not only left more assets but stole assets that she was suppose to divide with her siblings. Coincidentally, my neighbor's name is Janice except that she is the sister who did not get what she was entitled to. But, not all Janices are created equal!!!

Court is a last resort for me. But if Janice is given the opportunity to manipulate my mother and cause the estate planning of my parents to go awry, court may be the only answer to straighten things out. I would like to avoid that. Per Diane's conversation with Janice, Janice did not appear amenable to the word "court".

My mother has to not let Janice take power into her own hands like she has tried to do. I have been able to thwart some of that but Janice has the kids. Anytime Janice has had to sign anything like the

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stock transfers he may have made or advise you on who could access those records for you if not the bank itself.

- If the rep tells you to call New York Community Bankcorp (with whom Roslyn Saving Bank merged), tell her that you already tried them and they had advised you to call the branch of Roslyn Savings Bank directly where Daddy transacted business.

Perhaps Mommy may permit Chase Manhattan to send the images to me should they be able to be recovered (since Charles knows that Mommy made me her POA). I know how to fish out the information that we are seeking. I am sure you could do, too but I am not sure if Charles would be allowed to send them to you.

I hope that you will be able to have that 3-way conversations with Dr. Neubauer. Tell him that I was there with Ed and that I met his daughter Ginger.

I know that there are other things that have to be done for Daddy. When I mentioned them on the phone to Mommy this morning, she said that she would be willing to but she has to inquire about those programs. I think that there is a joke there somewhere.

At any rate, Good Luck. Remember, our birthrights are at stake and we are entitled to our equal shares despite the fact that we did not take the path of a yiddishe 19th century feather-brained homemaker and breed grandsons! You should get more. According to Mom, you should get more because you are still single. You may not like to use that but that is what Mommy bases her premise on. So use it!

Have a safe flight!

Love,  
Merrie

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