



Daniel [REDACTED] <djahare@gmail.com>

Mother's Trust

3 messages

Peggy [REDACTED] <peggy.chare@att.net> Wed, Mar 22, 2017 at 8:16 AM
To: Maureen [REDACTED] <maureenohare@gmail.com>, Dennis [REDACTED] <dohareson@gmail.com>, Daniel [REDACTED] <djahare@gmail.com>, [REDACTED] <green/mm@gmail.com>, "John & Karen [REDACTED] <karen.haughney@att.net>, Ed [REDACTED] <egghare@gmail.com>

Everyone,

Mother's Trust was invoked as of February 28, 2017, upon Mother's death 3 weeks ago. Maureen is the sole Trustee to carry out Mother's wishes as Ed gave his resignation to Mother on June 6th for any further involvement in her estate.

On November 7th Ed also told Mother she would never see him again and that he is no longer involved in any portion of her care.

Mother remained steadfast as to what she wanted no matter how many times she was pushed to change her plans and her documents.

The fact is that Mother chose Maureen as full Durable Power of Attorney for Health Care and full Durable Power of Attorney for Financial. In the original document Ed's name was within the financial POA document, but not listed as the entity to perform the financial decisions. Even the lawyer could not clearly explain that. It doesn't matter though since Ed resigned.

New documents were drawn up with a new lawyer as Atty. Shapiro reduced his case load due to personal situations. His recommended lawyer rewrote the Financial Durable POA and the Trust to remove Ed's name.

I am confident Maureen followed all Mom's instructions as Medical DPOA and Financial DPOA as Mother documented in 1997 and again in the revision in 2000, and lastly in 2016.

As of 2-28 when the Trust was invoked with Maureen as sole Trustee, Maureen began to carry out the instructions of the Trust and disperse assets among seven. This includes consolidation, liquidation, and disbursement of real estate and all financial accounts.

Separate from the Trust, Mother detailed a list of items for each of us and nearly 100% of that has been distributed.

As to Ed's request that he sent certified mail out on the day of Mom's visitation, and received after her funeral mass, it is bullshit. Ed relinquished any authority and has no authority to make any demands. Maureen will focus on following the instructions laid out in the Trust to liquidate and disperse.

not have the capacity to make a decision on her own or lead in this situation. If Maureen was concerned about her feelings or criticisms, she should have stepped down as Trustee.

With that being stated we all also know Peggy is serving as the key advisor i.e. telling Maureen what to do. And serving as the full defacto decision maker.

So, let me begin with the Trust:

A financial review of the trust can be requested by Grantors of the Trustee. The beneficiaries of the Trust have full rights to file this request for full understanding of all finances.

Ed's resignation as one of the Trustees is not at issue.

If Ed did not ask for this financial review on behalf of the Grantor/Beneficiaries, I was fully planning on filing this request for the review myself.

This makes perfect business sense to do this financial review. I would have requested this financial review even if Ed was still a Trustee.

A financial review of the Trust should be very easy if proper records, proper documentation and proper disbursements and accounting was followed. Basically, there should be a large paper trail of all the funds, who received them and why, and for what service, any cash disbursement of totaling \$600 dollars or more a 1099 would need to be filed. So Mom's estate does not pay penalties.

Maureen will need to do all of this anyway when filing the 1044 Form with the IRS on behalf the Trust, which will kick out a K-Form to all beneficiaries. We will all need that as well.

With the new Trust in place, as you have stated, a copy should be given to the all beneficiaries. In addition to providing the attorney's information.

Maureen has never balanced a checkbook, kept good records of anything in her personal life and she is NOT organized in any fashion and you are asking for me to trust what she did with Mom's Trust.

I deal with Trusts on a regular basis and your interpretation of the trust is incorrect. To state a review would diminish the value of Mom's estate is foolish. It would not have to go to court; we would simply hire an independent CPA for a financial review. If all expenses can be accounted for, with the proper documentation and explanation, it would very simple exercise in accounting.

I have reviewed Mom's accounts with her many times. Answering her questions and concerns of her accounts, her various funds, the value of her home. I have reviewed the title work of her house, her trust, the current mortgage and the loan agreement she has with the City of Farmington. The dollar amount you state in your email is significantly less than what was there. With value of Mom's home, the various accounts and funds, Mom's estate should be valued close to 300K if not more.

There should be paper work from the tree removal in the backyard, to the front porch work, right down to any kind of postage used while Maureen was in charge. Absolutely every transaction money transfer and payment should have a paper trail.

Even the health care people Maureen hired thru the internet, the neighbor she paid cash to, and so much more should be documented.

Strange thing is you were concerned about having a properly licensed and registered home for Mom, but Maureen used the internet to have someone care for mom. (By the way, that information came from one of the health care workers Maureen had hired. One of the days I had to sneak in to see my own Mother)

After I was there for a while, Mom stated that I better leave because she was afraid of Maureen coming and getting mad that I was there. Same thing came with phone calls--Mom would not talk to me on the phone if Maureen was there because she did not want to get Maureen mad.

You are asking me to trust everything is being handled correctly. However you, Maureen and Karen are NOT being truthful about Mom's death. Why when I looked at Mom for the last time she did have a bruise from her lower left buttock to her lower left knee. Why? Mom must have had another fall, broke her leg or hip and that is what caused her death. It tells me Mom was not being attended to by someone. Was Mom taken to the hospital, a report filed with the doctors, was something, anything done for her? Mom fell once before on the stairs at Jeff's house hurting herself quite badly due to Maureen not being in the proper spot when Mom was using the stairs. You will state well Mom falls a lot that will happen in her condition. Well not if she is being tended to properly.

Someone is once again burying information about Mom.

The breakneck speed and cavalier way you, Maureen and Karen handled everything at the wake and funeral lends itself to even more questions.

I believe you having Adam hand out boxes of belongings of Mom's at the wake showed your true lack of character and shameless disregard of anyone. So please do not try to play yourself, Maureen and Karen as having no culpability in this new family dynamic.

I will continue to ask the questions and look for more answers. I will begin to make demands and I will make declarations as you like to do. I think your role as the puppet master and hiding behind the curtain manipulating everything is ludicrous.

Dennis [REDACTED]
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Daniel [REDACTED] <djhare@outlook.com>

Wed, Mar 29, 2017 at 7:49 PM

To: Dennis [REDACTED] <dohare@outlook.com>

Cc: Peggy [REDACTED] <peggy.hare@outlook.com>, Maureen [REDACTED] <maurendhare@outlook.com>, [REDACTED] <jeen7mm@gmail.com> [REDACTED] <jeen7mm@gmail.com>, "John & Karen Haughney (karen.haughney@att.net)" <karen.haughney@att.net>, Ed [REDACTED] <egohare@outlook.com>

Wow communication! Although with the underlying tone of hatred, deception and contempt

None the less, it is a communication.

Thank you for the update.

Did anyone notice all the similarities at Mom's funeral mass and Grandma O'Hare's funeral mass from divide inside the Church to the pallbearers? Seems the only thing different was the Church. It wasn't right in 1980 and it wasn't right last month.

After reading both commentaries and filtering out the derogatory comments you are taking out on one another, Peggy's and Dennis's comments only raise more questions for me.

I don't claim to be an expert on trust or finances. I do believe in doing what is right.

I actual looked up Trustee. <http://legal-dictionary.thefreedictionary.com/Trustee>

A trustee is a fiduciary of the trust beneficiary. A fiduciary is legally bound to act, within the confines of the law, in the best interests of the beneficiary. A trustee is in a special position of confidence in relation to the beneficiary because the trustee has control of property that is essentially owned by the beneficiary.

Most trustees possess special knowledge about trusts and investments. By contrast, many beneficiaries are ignorant of such matters. This special knowledge is another feature of the trustee-beneficiary relationship that makes a trustee a fiduciary. A trustee must submit honest reports to the beneficiary and keep the beneficiary informed of all matters relevant to the trust.

I am sure this is a general statement, but for those us who do not work with Trust and Finances gives a pretty good idea.

I assume the Trust was invoked May or June last year. Wasn't Mom declared incompetent back then? I only assume that because it seems someone has taken the liberties of withdrawing funds out of the trust. When I was back there in May of 2016 everyone said there was \$220,000 in the trust.

As far as anyone asking for the financials, I do not see the issue with that, anyone who runs a household or business has it ready plus or minus a week. The documents are there. Why not share them.

\$10,000 a month is allot of money.

Dennis presented some question from the finance to Mom's health in her final month. I would appreciate the answers also.

Is there a reason why these questions can't be answered?

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