



BRENTWOOD LAW GROUP, PLLC

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February 5, 2024

SENT VIA CERTIFIED MAIL AND EMAIL

Joyce Anderson
720 West Gregory
Phoenix, AZ 85041
lazyjoyce@aol.com

Re: Administration of Ms. Leonhardt's Trust Funds

Dear Ms. Anderson:

As you know, Alice Louise Leonhardt ("Ms. Leonhardt") passed away on November 9, 2023. In 2017, Ms. Leonhardt created the Alice L. Leonhardt Revocable Trust dated February 26, 2017 ("Trust"). She was 98 years old. We represent Jane Walters ("Ms. Walters"), Successor Trustee in the administration of Ms. Leonhardt's Trust (the "Trust").

The Trust stated in Section 6.F how the Trust Estate would be distributed. Section 6.F specifically addressed what would happen to the proceeds of the property located at 7N216 Parkside Avenue, Itasca, Illinois 60143 (the "Illinois Property"). Section 6.F. states, in relevant part:

- (1) The Trustee shall distribute, free of trust, such items of my tangible personal property as may then be included in the Trust Estate in accordance with any written instructions left by me and the remainder of such personal property, or all of it if no such instructions are left, to the residue of my estate.
- (2) The Trustee shall distribute, free of trust, that certain real property located in the County of Dupage, State of Illinois, and more particularly known as 7 N. 216 Parkside Avenue, Itasca, IL 60143, to the following living children of my deceased spouse HERMAN L. LEONHARDT, to-wit: THOMAS LEONHARDT, GREGORY LEONHARDT, SCOTT LEONHARDT, RUTH LEONHARDT, and JOYCE ANDERSON, in equal shares, subject to all encumbrances and/or liens of record. If any such beneficiary predeceases me, then the share of the deceased beneficiary shall be distributed among the remaining living beneficiaries.
- (3) In the event such real property has been sold, then any identifiable proceeds from the sale thereof that remain at my death, shall be distributed to the beneficiaries designated in the paragraph above in the same manner as set forth therein.

- (4) The Trustee shall distribute the remainder of the Trust Estate in equal shares among my living children, to-wit: RICHARD WODRICH, DAVID WODRICH, MARGARET JANE WALTERS and WILLIAM WODRICH. If any such child predeceases me, then the share of the deceased child shall be distributed among the surviving living children.

The sale of the Illinois Property in 2017 netted proceeds of \$211,670. Ms. Leonhardt deposited those funds into a separate Chase bank account ("Chase Account"). The Trust provided that Ms. Leonhardt, at her discretion, could use those funds to pay for living expenses. By March 25, 2021, the Illinois Property funds decreased in the Chase Account from \$211,670 to \$38,522.73 due to Ms. Leonhardt paying her living expenses. This \$38,522.73 are the "identifiable proceeds" remaining.

On March 25, 2021, \$180,000 was deposited from a separate investment account into the Chase Account, with another \$105,037 transferred in July 2023. After Ms. Leonhardt paid her living expenses, the remaining balance in the Chase Account is \$189,640. Because Ms. Walters believes that a quick distribution of the Trust is in the best interests of all beneficiaries, this letter is to request that you review and sign the attached waiver, which states you consent to the equal eight way split of the \$189,640. This is an equal payment of \$23,705 per living child of Ms. Leonhardt and Mr. Herman Leonhardt.

Attached to this letter is a waiver which states that you agree to receive \$23,705 and waive any and all potential claims. Please respond to this letter in writing by close of business on February 19, 2024. You can contact me at sbrower@brentwoodlg.com.

Sincerely,

/s/ Stephen Brower

Stephen Brower