

Otter.ai Prompt Suite (REVISED WITH SEPTEMBER 15 TRANSCRIPT CONTEXT)

Copy these 8 prompts to Otter.ai tonight:

OTTER.AI PROMPT #1: Kathy's Statement on \$12,100 Transfer

text

Search transcripts from Sept 15-30, 2025 between Eric Jones and Kathy Hart. Find any discussion where Eric asks Kathy about a \$12,100 transfer allegedly authorized by Kathy on Sept 23 to move money from joint account to personal checking. Extract: (1) Date of call, (2) Whether Kathy confirms or denies authorizing this transfer, (3) Whether Kathy confirms or denies speaking to Leatha Goldstein on Sept 23, (4) Kathy's exact quotes. Format: Date | Time | Speaker | Direct Quote.

Otter.AI Response: "Here are all relevant discussions from Sept 15–30, 2025 between Eric Jones and Kathy Hart regarding a \$12,100 transfer (or any transfer of money from joint to personal account) and whether Kathy authorized such a transfer or spoke to Leatha Goldstein on Sept 23.

Key Findings

****No Exact Mention of a \$12,100 Transfer on Sept 23****
Across all reviewed conversations, there is no direct quote where Eric explicitly asks Kathy: "Did you authorize a \$12,100 transfer from the joint account to your personal checking on Sept 23?" Nor does Kathy directly confirm or deny authorizing a \$12,100 transfer on or around that date.

****Closest Context: Transfers from Joint Account to Personal Account****

Several sections discuss transfers from the joint account to Kathy's checking to cover checks (including to Eric and others). The amounts and specific dates differ from exactly \$12,100, but the operation is conceptually similar. These conversations include discussion about Chase Bank, Lisa (at the bank), and account balances.

Extracted Results

Date	Time	Speaker	Direct Quote/Context
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2025-09-25 Unspecified Kathy Hart "So she took enough out of the 24,500 account. And she transferred it into my checking account. That's 8000 to cut to cover those checks I wrote to everybody, plus, plus she said she was doing it so that it would still leave the 8000... Now, as far as I know, I'm not going to get any more money, oh God," [[September 25_Eric B Jones calls Kathy A Hart at the Ashley Grande Center in Tyler, Texas regarding Chase Bank POA status](https://otter.ai/u/qEWHesfhfQ5RwTF-BEE5-IqFU)]			
2025-09-25 Unspecified Eric Jones "So, so the joint account is now 8000 and not 24..." [[September 25_Eric B Jones calls Kathy A Hart at the Ashley Grande Center in Tyler, Texas regarding Chase Bank POA status](https://otter.ai/u/qEWHesfhfQ5RwTF-BEE5-IqFU)]			
2025-09-25 Unspecified Kathy Hart "my own checking account that I've had forever. Okay, its own. She said it's only 8000 those checks are going to bounce. Yeah, and I said, don't let them bounce. I keep I don't want Eric's to bounce or any of those. So she took, you and I have, apparently, a joint account			

separate from that. That's 24 five so she took enough out of the 24 500 account." [[September 25_Eric B Jones calls Kathy A Hart at the Ashley Grande Center in Tyler, Texas regarding Chase Bank POA status](<https://otter.ai/u/qEWHesfhfQ5RwTF-BEE5-IqFU>)] | | 2025-09-25 | Unspecified | Kathy Hart | "She took enough out of the 24 500 account. And she transferred it into my checking account. That's 8000 to cut to cover those checks I wrote to everybody, plus, plus she said she was doing it so that it would still leave the 8000 Yeah, that was originally there."

[[September 25_Eric B Jones calls Kathy A Hart at the Ashley Grande Center in Tyler, Texas regarding Chase Bank POA status](<https://otter.ai/u/qEWHesfhfQ5RwTF-BEE5-IqFU>)] | | 2025-09-25 | Unspecified | Eric Jones | "Would you want me to talk to Amy? Because she's kind of a nurse, and she, when she visits you, she can talk to the people there, to kind of, she has, like, a nice nurse, \n... I'm the power of attorney over there. I hope Lesley is not still a power of attorney. I don't know. I haven't got a clue what she's doing to me." [[September 25_Call with Kathy Hart and POA Eric B Jones part 2 at Grande Center

Rehabilitation](<https://otter.ai/u/swc06oC7AM2iw07vSgi9qW9H690>)] | | 2025-09-15 | Unspecified | Eric Jones | "I need, I need to ask you some questions, because I'm going to, because what they're doing at Chase right now. This is, this is, this is violating so many laws. It's crazy, because this is me taking care of you. We set up this joint account, and they're saying the only way we can unfreeze it. Lisa told me she's she knows that the joint account is frozen, and she told me on Saturday, she said, or Friday, Kathy's gonna have to come in here herself and and, and I said, That's impossible, Lisa. And she said, I don't know. You're gonna have to talk to kristalinas. And I was like, Well, I'm not gonna have to talk to make it impossible happen. This is a life this is a medical emergency. Are you telling me that you guys aren't gonna do and, and so they're just playing, they're

playing this little game." [[SEPT 15_Call to Kathy at Grande Center regarding Chase Bank](<https://otter.ai/u/Hf0GiAAQpBMd6FjGu3zru14ACmo>)] |

****Whether Kathy confirms/denies authorizing the transfer:****
Kathy agrees that Lisa (at Chase) told her about transferring money from the joint account to her personal checking to cover various checks. She does not give an explicit "I authorized this transfer" or "I did not authorize it," but the tone is that she is reporting what Lisa said the bank did to cover the checks she wrote.

****Whether Kathy confirms/denies speaking to Leatha Goldstein on Sept 23:****

Across all reviewed calls, there is no indication or direct quote of Kathy confirming or denying speaking to Leatha Goldstein specifically on Sept 23. Leatha is mentioned as a Chase branch manager elsewhere, but not in the lines related to this specific transfer.

If you need an even finer-grained search (such as transcripts for each individual day or verification that Leatha was discussed separately), just specify and I can proceed call-by-call.

Citations:

[[September 25_Eric B Jones calls Kathy A Hart at the Ashley Grande Center in Tyler, Texas regarding Chase Bank POA status](<https://otter.ai/u/qEWHesfhfQ5RwTF-BEE5-IqFU>)],
[[September 25_Call with Kathy Hart and POA Eric B Jones part 2 at Grande Center

Rehabilitation] (<https://otter.ai/u/swc06oC7AM2iw07vSgi9qW9H690>)]
, [[SEPT 15_Call to Kathy at Grande Center regarding Chase
Bank] (<https://otter.ai/u/Hf0GiAAQpBMd6FjGu3zru14ACmo>)]
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OTTER.AI PROMPT #2: Chris Salinas Freeze Decision August 27

text

Review transcript

"AUG-27_Chase-Bank-Global-Security-Chris-Salinas-Call.txt" at 10:07 AM CT. Extract Chris Salinas' exact statements explaining account freeze. Include: (1) His quote about being "not comfortable," (2) Eric's explanation of \$5,000 and \$10,000 transfers, (3) Whether Chris requested to speak to Kathy directly, (4) Whether Chris said freeze would be lifted after speaking to Kathy, (5) Any statement by Chris that contradicts later Chase actions. Timestamps and verbatim quotes only.

Otter.AI response:

OTTER.AI PROMPT #3: El Monte Branch - No Chase Written Policy

text

Search "SEPT-13_Chase-Bank-On-site-meeting-El-Monte-Branch.txt" for all instances where Eric requests Chase Bank's written policies. Extract Denise (El Monte Manager)'s exact responses. Include: (1) Timestamp, (2) Eric's request wording, (3) Denise's exact response, (4) Denise saying "I don't really have like a specific guide" or similar, (5) Denise's statement about finding Eric's situation "odd" or unusual. Format as timestamped dialogue.

OTTER.AI PROMPT #4: Leatha Goldstein September 26 Transfer Claim

text

Review transcript "September-26_Call-with-Leatha-Goldstein" where Leatha states Kathy authorized \$12,100 transfer on Sept 23 from joint account to personal checking. Extract: (1) Leatha's exact quote about Sept 23 conversation with Kathy, (2) What Leatha claims Kathy said, (3) Whether Leatha describes this as phone call or in-person, (4) Any other claims by Leatha about speaking directly to Kathy. Timestamps and exact quotes.

OTTER.AI PROMPT #5: September 15 Exhibit K-4 Medical Impossibility

text

Review "SEPT-15_Call-to-Kathy-at-Grande-Center" (Exhibit K-4). Extract Kathy's statements about her medical condition and inability to leave facility. Focus on: (1) Description of back surgeries and vertebrae, (2) "Bedridden" status, (3) Physical therapy limitations (75 feet with walker, wheelchair, strap), (4) Quote "I wouldn't be allowed to leave... that would be out of the realm of my care," (5) Pain medication limitations. Timestamps 28:51-31:27 and 43:47-46:05.

OTTER.AI PROMPT #6: September 15 POA Authorization (Exhibit K-4a)

text

Review "SEPT-15_Call-to-Kathy-at-Grande-Center" starting at timestamp 38:00. Extract Kathy's verbatim authorization statements when Eric prompts her. Include exact quotes: "I

authorize JP Morgan Chase to rely on my POA," "without requiring an in-person visit," "to call me for remote verification," "in person is medically impracticable," "I need access restored to pay caregivers and purchase essentials." Timestamps 38:27-40:10.

OTTER.AI PROMPT #7: Chase Ineffectiveness on Lesley (Sept 15 Exhibit K-4)

text

Review "SEPT-15_Call-to-Kathy-at-Grande-Center" timestamp 43:36-46:05. Extract Kathy's statement when Eric asks "Do you feel Chase has been effective addressing Lesley's unauthorized account use?" Include Kathy's exact quote: "No one has ever said to me... here's what we're doing... here's how we're protecting you... Chase has done only one thing, freeze my account and leave me paralyzed." Full verbatim quote starting 43:47.

OTTER.AI PROMPT #8: Unauthorized Transactions During Freeze Period

text

Search all transcripts Aug 14-Sept 26, 2025 where Eric or Kathy discuss specific unauthorized transactions, charges, or transfers by Lesley Johnson, Kim Salerno, or caretaker during the period Chase froze accounts. Extract: (1) Date of transcript, (2) Transaction type (Airbnb, makeup, check, transfer), (3) Amount if stated, (4) Perpetrator name, (5) Whether Eric mentions being blocked from stopping it due to frozen accounts. Format: Date | Transaction | Amount | Perpetrator | Eric's POA Action Blocked.