



MUNEKIYO HIRAGA

Planning, Project Management, Real Estate Services

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TO: Robert Carroll, Chair
Maui County Council
Land Use Committee
200 South High Street, 7th Floor
Wailuku, Hawaii 96793

DATE: July 18, 2016

SUBJECT: Additional Information on the
Trust for Angela and Charles
Nunes, Jr. Submitted by Email
Correspondences to the Land
Use Committee on LU-20
Resolution for a Community
Plan Amendment and Change in
Zoning for Property Situated at
TMKs (2)4-4-001:010 (por.) and
(2)4-4-014:006 (por.)

Enclosed is/are:

Copies	Date	Description
1	1/7/97	Memorandum from Attorney Richard L. Frunzi

For your comment
For necessary action
For your review
For your files

X

For your use
As requested
For your signature
Returning

REMARKS:

As requested, we are formally transmitting the additional information regarding the trust for Angela and Charles Nunes Jr. If there are any questions, please call me at 244-2015.

Signed: _____

Colleen Suyama
Senior Associate

Copy to: Steve Sewall (w/enclosure)
Chuck Nunes (w/out enclosure)

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Maui: 305 High Street, Suite 104 • Wailuku, Hawaii 96793 • Tel: 808.244.2015 • Fax: 808.244.8729

Oahu: 735 Bishop Street, Suite 321 • Honolulu, Hawaii 96813 • Tel: 808.983.1233

www.munekiyo-hiraga.com

Richard L. Frunzi

Attorney At Law

MEMORANDUM

To: To Whom It May Concern
From: Richard L. Frunzi, Esq.
Date: January 7, 1997
Re: Charles James Nunes, Jr. and Angela Marie Nunes

I am writing to you on behalf of Charles James Nunes, Jr. and Angela Marie Nunes. Mr. and Mrs. Nunes established their living trusts on March 12, 1987 and would like their accounts transferred into their trusts.

Title should be as follows:

"Charles James Nunes, Jr., Trustee of the Charles James Nunes, Jr. Revocable Trust dated March 12, 1987, as amended"

"Angela Marie Nunes, Trustee of the Angela Marie Nunes Revocable Trust dated March 12, 1987, as amended"

If you have any questions, please do not hesitate to call.

Mr. and Mrs. Charles James Nunes, Jr.
January 7, 1997
Page 2

Short Form Trust Agreement dated May 7, 1990

The enclosed documents are the originally executed bond copies of your estate planning documents and, in some cases, may be the only originally executed copies of such documents in existence. We therefore strongly suggest that you keep these documents in a place of safekeeping and alert members of your family as to where they have been stored. In addition, we recommend you avoid the urge to mark on these documents as such marking may affect the validity of the documents. Copies of these documents have been placed in your file.

Title to your trust assets should read as follows:

"Charles James Nunes, Jr., Trustee of the Charles James Nunes, Jr. Revocable Trust dated March 12, 1987, as amended"

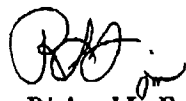
"Angela Marie Nunes, Trustee of the Angela Marie Nunes Revocable Trust dated March 12, 1987, as amended "

Because your trust is revocable, the transfer of property into it will have no effect on your income taxes or property taxes, but will avoid probate. In your estate planning binder, I have enclosed a memorandum which describes the duties and powers of a trustee as well as the income tax reporting requirement for the trust.

With the funding of your trusts, we have completed the active phase of our estate planning work for you. Your estate planning documents have been prepared based upon your situation as it has been disclosed to us and as we anticipate it will be in the foreseeable future. Accordingly, until we hear from you again, our role will be limited to sending you periodic reminders of the desirability of reviewing your current estate planning documents. As we discussed, it is our firm's recommendation that you review your will and other estate planning documents either every three to four years or when there is a large or unexpected change in your family or financial situation to insure that it continues to meet your needs.

I am happy to have assisted you in your estate and tax planning. Please do not hesitate to give me a call if you have any questions.

Sincerely,



Richard L. Frunzi

RLF:jm
Enclosures