



**MUNEKIYO HIRAGA**

Real Estate, Project Management, Construction Services

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COUNTY CLERK

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**TO:** Robert Carroll, Chair  
Maui County Council  
Land Use Committee  
200 South High Street, 7<sup>th</sup> 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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**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"

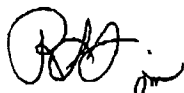
"Angela Marie Nunes, Trustee of the Angela Marie Nunes Revocable Trust dated March 12, 1987, as amended "

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