

40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 13

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
06/23/09	LMC	Review court order. Status update from Attorney Losier. E-mails from Ms. D. Eklund with status update. E-mails from RN Sobel-Medow and Ms. D. Eklund regarding coverage. E-mails to Ron Eklund, Brad and Diana Eklund and RN Sobel-Medow regarding coverage in various spots. <u>Review annuities to determine which to liquidate.</u> E-mails from and to Paralegal Quinan regarding same. E-mails from and to Ms. D. Eklund and to Ms. Linda Defabritiis regarding Ms. Eklund's comfort, happiness, enjoyment of Bridgett and Linda's possible visit over the weekend.	0.60
06/24/09	LMC	Multiple emails from and to Mr. B. Eklund, Mr. R. Eklund, RN Sobel-Medow and Ms. L. Defabritiis regarding weekend coverage and weekday night shift changes; emails from and to Ms. D. Eklund and RN Sobel-Medow regarding scheduling gaps.	0.40
06/24/09	SBQ	Review and respond to E-mail from Attorney Cukier concerning annuity withdrawal and financial projections.	0.10
06/24/09	TE	Trip to Middlesex Probate to inquire on status of exemplified copy of decree. Request to be processed within one week. Status update to Paralegal Quinan and Attorney Cukier.	0.20
06/25/09	DML		0.20
06/25/09	LMC	Email from RN Sobell-Medow regarding coverage; scheduling emails with Ms. Linda Defabritiis and RN Sobell-Medow; emails regarding Linda's sudden visit today.	0.50
06/26/09	LMC	Telephone conference with Cyndi Eklund regarding coverage; email to RN Sobel-Medow regarding coverage; email regarding key to Washington Terrace home; <u>emails regarding Linda's unexpected visit with Mrs. Eklund;</u> email from RN Sobel-Medow and to Ms. L. DeFabritiis regarding spontaneous visits.	0.40
06/26/09	SBQ	Respond to voicemail from Attorney Cukier regarding information pertaining to money market account; prepare John Hancock annuity withdrawal form; conference with Attorney Cukier regarding tax obligation on withdrawal of annuity funds; review and file invoices pertaining to payment of expenses.	0.60
06/27/09	LMC	Email from Mr. R. Eklund regarding extra key; mail same to Mr. R. Eklund.	0.10
06/29/09	LMC	Banking (actual time .40)	0.10
06/29/09	SBQ	Conference with Attorney Cukier regarding surrender of annuity; review payment of invoices.	0.30
06/30/09	LMC	Review correspondence of Attorney O'Reilly. Follow up with action plan to Paralegal Quinan for preparation of Roger's review.	0.10

40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 14

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
07/01/09	LMC	Emails from and to RN Sobel-Medow regarding scheduling of dental and change of contact person.	0.10
07/02/09	DML		0.50
07/02/09	LMC	Status update from Attorney Losier regarding Settlement; work on Settlement of issues with Ms. Sharyn Eklund by emails with Attorney Losier; email from Ms. Linda DeFabritiis regarding Sunday visit; email to Mr. Ron Eklund regarding same.	0.30
07/02/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding sale of SD property.	0.10
07/03/09	LMC	Telephone conference with Mr. Ron Eklund regarding Sunday visit by Ms. L. DeFabritiis; telephone conference with RN Sobel-Medow regarding Ms. Eklund's care and health; telephone conference with Mr. R. Eklund regarding same; text messages regarding vital signs and no symptoms.	0.40
07/04/09	LMC	Emails from and to Diana and Brad Eklund regarding status and follow-up after visit; text messages from and to Mr. R. Eklund with care and vital signs update.	0.20
07/06/09	DML		0.30
07/06/09	LMC	Telephone Call with Peace of Mind Home Health Care. E-mails with Paralegal Quinan regarding care plan and pleadings to add Roger's authority. E-mail from Mr. R. Eklund regarding Mrs. Eklund's weight parameters. E-mail to and from RN Sobel-medow regarding long term life supports, CPR, basic life saving measures, DNR versus code status and stress test for cardiac and arterial status.	0.50
07/06/09	SBQ	E-mail to Attorney Cukier; work on care plan.	1.70
07/07/09	LMC	E-mails with RN Sobel-Medow regarding full code status and stress test. E-mail from and to RN Sobel-Medow regarding factors to consider in decision whether to give Mrs. Eklund a stress test.	0.40
07/07/09	SBQ	Travel to Middlesex Registry of Probate; work to locate file; telephone conference with Attorney Cukier's office regarding obtaining information for lost case request; meet with copy clerk to request status of authenticated copy.	2.70
07/08/09	LMC	Status update email from RN Sobel-Medow; forward same to Brad Eklund; email from Ms. Linda DeFabritiis regarding weights and	0.30



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 15

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
07/08/09	SBQ	comparisons; email to RN Sobel-Medow regarding same. Two trips to Middlesex Registry of Probate concerning the request for exemplified copies; obtain exemplified copy; review South Dakota Limited Conservatorship Petition; e-mails to and from Attorney Cukier regarding Conservatorship Petition; notarize Attorney Cukier's signature on Conservatorship Petition.	4.30
07/09/09	LMC	E-mails regarding health status and weight fluctuations, visits and dental issues. E-mail from and to Mrs. C. Eklund regarding regularity of visits by Linda DeFabritiis. E-mails regarding visits on Sunday by Ms. DeFabritiis.	0.50
07/10/09	LMC	E-mails from Paralegal Quinan regarding tax returns for Mrs. Eklund. E-mail health status updates from RN Sobel-Medow. Responses from Ms. DeFabritiis and Ms. S. Eklund.	0.30
07/10/09	SBQ	Review tax returns for content and accuracy; e-mail to accountant; e-mail to Attorney Cukier regarding 2007 tax return information.	1.30
07/13/09	LMC	E-mail from and to Mrs. C. Eklund. E-mail to RN Sobel-Medow regarding coverage.	0.10
07/13/09	SBQ	Review e-mail from Attorney Cukier; draft correspondence to Ms. Bragdon regarding 2007 taxes; work on treatment plan; review invoices; update spreadsheet relating to payment of invoices.	2.70
07/14/09	LMC	Emails regarding coverage and scheduling; telephone conference to Attorney Brodeur.	0.10
07/16/09	LMC	Telephone call to Attorney Paul Brodeur; deposit Hancock and Manulife checks; notes regarding same to paralegal Quinan.	0.60
07/17/09	LMC	Emails from Ms. Defabritiis regarding visit; forward to Mr. R. Eklund and RN Sobel-Medow; email from Ms. Defabritiis regarding air conditioner; follow up to Mr. Eklund and RN Sobel Medow; email from RN Sobel-Medow regarding scheduling; emails with Mr. R. Eklund and RN Sobel-Medow regarding air conditioning; telephone call from Attorney Paul Brodeur regarding <u>Sharyn's latest missive to politicians</u> ; review Hancock statements.	0.50
07/20/09	LMC	Review and pay invoices; discuss life insurance and Manulife account with Paralegal Quinan; review Life Insurance statements, bank statement, retirement policy; emails regarding scheduling.	0.60
07/20/09	SBQ	Conference with Attorney Cukier regarding life insurance policies; draft correspondence to John Hancock representative to obtain information on life insurance policies.	0.50
07/22/09	LMC	Emails regarding Manu Life check and regarding air conditioner.	0.10
07/22/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding	0.50

40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
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16 Sep 2009

Invoice Number 711766  
Page 16

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
		ManuLife dividend payments; research dividend payments.	
07/23/09	LMC	Extensive emails from Mr. R. Eklund, from Paralegal S. Quinan and to Mr. Eklund regarding Manulife Investment Account.	0.50
07/23/09	SBQ	Telephone call to Manulife regarding address of record and transfer of stock ownership; prepare transfer forms; e-mail to Attorney Cukier regarding information obtained from Manulife; research relating to medallion signature guarantee; contact Citizens bank regarding medallion signature guarantee; instructions to administrative staff; review e-mail from Attorney Cukier.	1.40
07/24/09	DML		0.50
07/24/09	LMC	Strategy conference with Paralegal Quinan regarding Manulife Investment. Review notice from Social Security. E-mails from and to Ms. C. Eklund regarding air conditioner and weekend visit. Meeting with Paralegal Quinan regarding representative payee reporting. E-mail to Ms. Regina Bragdon regarding taxes in 2007.	0.55
07/24/09	SBQ	Review interoffice communication from Attorney Cukier; prepare response to request from social security for information; calculate totals for social security response; e-mails to and from Attorney Cukier regarding social security request for information; review invoices; file maintenance; conference with Attorney Cukier regarding signature guarantee.	2.80
07/27/09	DML	-	0.40
07/27/09	LMC	Emails from Ms. Bragdon and Paralegal Quinan and to Ms. Bragdon to ensure 2007 tax return date; deposits at Citizen's Bank; meeting with bank representative for to Medallion signature guarantee; emails with Ms. Souris, Mr. R. Eklund and Ms. L. Defabratis regarding visiting and scheduling for care; emails with Attorney Benson and Mr. R. Eklund and Ms. E. Souris regarding contempt hearing; emails with RN Sobel-Medow regarding walker and knee brace; strategy conference with Paralegal Quinan regarding life insurance proceeds, social security reporting and accounts; review flow sheet from Ms. L. Defabratis; discuss issue of back pack with RN Sobel-Medow; work on stipulation of parties; strategy email to Attorney Losier an Attorney Howard regarding same.	1.60
07/27/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding review of tax return by Regina Bragdon; conferences with Attorney	0.70



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 17

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
07/27/09	TH	Cukier; finalize form request from social security for information; transmit form to social security.	0.40
07/28/09	DML		0.30
07/28/09	LMC	Further edits to and suggestions to stipulation; coverage and scheduling emails with Ms. L. Defabritiis, Mr. R. Eklund and Janet Sobel-Medow, RN; emails regarding safety too; rummage through boxes and drawers.	0.50
07/28/09	TH		0.40
07/29/09	DML		0.40
07/29/09	LMC	Review emails from R. Eklund and RN Sobel-Medow; telephone call to RN Sobel-Medow.	0.10
07/29/09	TH		0.30
07/30/09	DML		0.30
07/30/09	LMC	Brief appearance before Judge Monks for continuance. Notice to parties and counsel. Arrange for Ron Eklund to provide key to Linda DeFabritiis and from Linda to home health aid. Telephone Call with Attorney Losier regarding settlement.	0.60
07/30/09	TH		0.70
07/31/09	LMC	E-mail regarding scheduling from RN Sobel-Medow.	0.10
08/03/09	DML		0.20

40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 18

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
		email from Atty Howard re: same.	
08/03/09	SBQ	While at Middlesex Registry of Probate on another matter, unsuccessful attempt to locate file; meet with clerk to request a certificate of appointment.	0.40
08/03/09	TH		0.10
08/04/09	LMC	Review court Scheduling Order. Forward to counsel. E-mails from and to RN Sobel-Medow and to Ms. Defabritiis regarding weekend coverage and visits.	0.20
08/05/09	DML		0.20
08/05/09	LMC	Emails from and to RN Sobel-Medow regarding weekend scheduling for Linda DeFabritiis; emails with Paralegal Quinan regarding medical certificate for Rogers and regarding documents needed by Attorney Olinger; emails from and to Ms. DeFabritiis regarding visits	0.40
08/05/09	SBQ	Return telephone call from Attorney Olinger regarding South Dakota property; e-mail to Attorney Cukier; review e-mail from Attorney Olinger.	0.40
08/05/09	TH		0.10
08/06/09	LMC	Emails with RN Sobel-Medow regarding scheduling and regularity in Linda's visits.	0.10
08/06/09	SBQ	Review e-mail relating to contact information for primary care physician.	0.10
08/07/09	LMC	Emails regarding scheduling.	0.10
08/07/09	SBQ	Review invoices; file maintenance; update John Hancock balance sheets.	0.50
08/09/09	LMC	Review and pay invoices; correspondence to cash-in Life Insurance.	0.50
08/10/09	LMC	Telephone call from and to Ms. Beth Thompson; emails with paralegal Quinan regarding uncashed checks and account balances; emails with Ms. DeFabritiis regarding visit with Ms. Eklund this weekend.	0.30
08/10/09	SBQ	Update Citizens account balances for two months; update spreadsheet with new payment of invoices; review and respond to e-mails from Attorney Cukier regarding account balances.	2.70
08/11/09	DML		0.30



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 19

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08/11/09	LMC	Emails from Mr. R. Eklund and from RN Sobel-Medow regarding scheduling; <u>multiple telephone conferences with Lucy (caregiver)</u> , RN Sobel-Medow and staff at Melrose-Wakefield Hospital; email status update to all children of Mr s. Eklund; emails to and from Ms. Beth Thompson of Hancock; strategy emails from and to paralegal Quinan; emails to and from Ms. Beth Thompson regarding plans for life insurance.	0.80
08/11/09	SBQ	Update spreadsheet with payment of additional invoices; review and respond to e-mails from Attorney Cukier regarding John Hancock Life Insurance requests.	0.40
08/12/09	LMC	Telephone conference with RN Sobel-Medow on several occasions regarding Ms. Eklund's status at hospital; emails regarding coverage; telephone conference with Dr. Bolla regarding Ms. Eklund's medical needs; telephone conference with nurse regarding discharge and sitter/home health aide coverage; emails to and from family; emails from Hancock regarding need for certified decree and regarding premium on life insurance.	0.90
08/13/09	DML		0.30
08/13/09	LMC	Email to family regarding hospitalization and discharge status, following telephone conference with Dr. Bolla; email from and to RN Sobel-Medow regarding scheduling ; correspondence to medical providers for update medical records; telephone conference with continuing care nurse; email update from RN Sobel-Medow; status update to family and counsel; review discharge summary.	0.80
08/14/09	LMC	Status update for RN Sobel-Medow.	0.10
08/17/09	LMC	Emails regarding scheduling.	0.10
08/18/09	DML		0.30
08/18/09	LMC	Review and endorse forms from Winchester Home Health Care.	0.10
08/18/09	TH		0.10
08/19/09	LMC	Review account statements.	0.10
08/20/09	LMC	Emails regarding status of Mrs. Eklund and scheduling for caregivers.	0.10
08/24/09	LMC	Review multiple invoices and statements.	0.10
08/24/09	LMC	E-mail from Ms. DeFabritiis regarding visit with Mrs. Eklund.	0.10
08/25/09	DML		0.30

40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 20

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
08/25/09	LMC	Status update from RN Sobel Medow.	0.10
08/25/09	SBQ	Review and respond to e-mail from SD couns el.	0.10
08/25/09	TH		0.10
08/28/09	LMC	E-mails between RN Sobel-Medow, Ron Eklund and Linda Eklund regarding weight increase and Lasix dose. Review Settlement Agreement. E-mail Attorney Losier and Attorney Howard. Review invoices. Pay same. Status update to Paralegal Quinan.	0.60
08/31/09	DML		0.40
08/31/09	LMC	Status update regarding weight loss following new Lasix dose, from RN Wooldridge. Banking for Mrs. Eklund (Actual time 1.0) Review Medical Summary.	0.40
08/31/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding account balance for payment of invoices.	0.10
08/31/09	TH		0.20
Total Hours			118.70

**Timekeeper Time Summary:**

<u>Name</u>	<u>Status</u>	<u>Hours</u>
Elizabeth G. Crowley	A	0.90
Lisa M. Cukier	P	46.50
Terri Evans	PL	0.20
Tiffany Howard	A	15.30
David M. Losier	P	18.60
Sharon B. Quinan	PL	37.20

Current Fees: \$40,335.50

**For Costs Advanced and Expenses Incurred:**

<u>Date</u>	<u>Description</u>	<u>Value</u>
03/27/09	VENDOR: Boston Cab Dispatch, Inc.; INVOICE#: 042609; DATE:	53.00



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
16 Sep 2009

Invoice Number 711766  
Page 21

<u>Date</u>	<u>Description</u>	<u>Value</u>
	4/26/2009	
05/14/09	VENDOR: Middlesex Registry of Probate; INVOICE#: 051409; DATE: 5/14/2009	51.00
07/24/09	VENDOR: Middlesex County Registry of Probate; INVOICE#: 072409; DATE: 7/24/2009	20.00

Other Expenses through 08/31/09:

Express Mail	12.82
Messenger	59.82
Photocopies	362.40
Postage Courier Or Express	6.32
Telecopier	69.00
Toll Calls	5.75

Total Costs	<u>\$640.11</u>
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Current Expenses:	\$640.11
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Total Balance Due This Invoice:	\$40,975.61
Prior Balance for Matter 00000 Guardianship of Elizabeth Eklund:	\$70,327.43
Total Balance Due:	<u>\$111,303.04</u>

REMITTANCE COPY

**BURNS & LEVINSON LLP**

125 SUMMER STREET BOSTON, MA 02110

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FEDERAL ID # 04.2265163

Lisa M. Cukier, Guardian of Elizabeth Eklund  
Lisa M. Cukier, Esq.  
Burns & Levinson LLP  
125 Summer Street  
Boston, MA 02110

Invoice Number	711766
Invoice Date	09/16/09
Client Number	40945
Matter Number	00000

Amount Due This Invoice:

\$40,975.61

Prior Balance for Matter 00000 Guardianship of Elizabeth Eklund:

70,327.43

Total Balance Due:

\$111,303.04

To accommodate you, we also accept Visa, MasterCard, Discover and American Express. For those clients who have requested it, a confidential authorization form is enclosed. Please fill in all information, including the VV2 value (\*CVV2 Security Identification Number).

\* (For MC/Visa/Discover cards this is the last 3 digits of the account number in the signature strip on the back of the card. For Amex cards, it is the 4 digit code (not embossed) on the front of the card).

Please visit [burnslev.com/online-payment](http://burnslev.com/online-payment) to make a secure online payment of your invoice.

If you have any questions, please email us at [paymentinfo@burnslev.com](mailto:paymentinfo@burnslev.com)



Commonwealth of Massachusetts  
The Trial Court

Middlesex Division

Probate and Family Court Division

Docket No. 05P5445

S.J.C. Rule 1:07 Statement of Payment

Matter / Estate of

Elizabeth A. Eklund

In the matter of my appointment as

Guardian

by Justice Robert Langlois

on

July 19,

2007.

I hereby certify that I have performed services, the value of which is:

\$24,626.25

and have incurred the following itemized expenses:

\$1,072.20

For the period beginning November 25, 2009 – December 31, 2009

TOTAL

\$25,698.45

Please check appropriate box:

1. ☐ Commonwealth Payment (Attach Certificate of Services and Itemization of Services pursuant to Fiscal Year 1997 Memo #14)
2. ☐ Committee for Public Counsel Payment
3. ☒ Private Payment
4. ☐ Payment to Myself (See below – Judicial Approval Required)

Signed under the penalties of perjury.

Signature

Name

Lisa M. Cukier

Address

125 Summer Street

Boston, MA 02110

Tel. No.

(617) 345-3000

B.B.O. or Board of Registration Number:

558824

Approved: (Approval Required Only if Box 4 Above is Checked)

Date:

Justice

NOTICE TO APPOINTEE

In accordance with the General Rules of the Supreme Judicial Court, Rule 1:07 Section (7): "No payment shall be made or received on account of any appointment required to be recorded in the appointment docket until a statement under the penalties of perjury, certifying the services provided, amount of payment, and itemization of expenses, is filed with the clerk, register, or recorder, to be placed with the papers in the case. No person holding an appointment required to be recorded in the appointment docket under Section (5) of this shall make any payment to himself or herself until such payment is approved by the court." (Emphasis supplied.)

# BURNS & LEVINSON LLP

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FEDERAL ID # 04.2265163

Lisa M. Cukier, Guardian of Elizabeth Eklund  
Lisa M. Cukier, Esq.  
Burns & Levinson LLP  
125 Summer Street  
Boston, MA 02110

Invoice Number 720501  
Invoice Date 01/06/10  
Client Number 40945  
Matter Number 00000

RE: Guardianship of Elizabeth Eklund

For Professional Services Rendered through 12/31/09:

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
11/25/09	DML	Review email from Atty Cushing re: accounts and agreement for judgment.	0.20
11/25/09	LMC	Oversee scheduling of home health aids and family visits. Appearance at Middlesex Probate Court for certified decree of Appointment. Text messages and e-mails with Mr. Ron Eklund regarding note from Gary Frost to Sharyn Eklund.	1.00
11/30/09	LMC	Review Medicare statement and correspondence from Citizens Bank. E-mails from Ms. L. DeFabritiis regarding Sunday visit. Review correspondence from Attorney Cushing regarding account of R. Bragdon.	0.30
12/01/09	DML	Email with Atty Cukier re: roofing issue and necessary follow-up.	0.20
12/01/09	LMC	Scheduling email from RN Sobel-Medoro; Email from Attorney Cushing re: Primak partners; Review account; Review correspondence from Winchester Bank; Correspondence by fax back to Winchester Bank authorizing copy service charges	0.30
12/02/09	DML	Email with Atty Cukier and conf with Atty Samaral re: roofing contractors and need for repairs; review email from Atty Cushing re: Winchester bank records.	0.60
12/02/09	LMC	E-mails with Attorney Cushing regarding Bragdon accounts and Winchester Savings Bank records. E-mails with Paralegal Quinan regarding Bragdon account and inventory. Correspondence to Winchester Savings Bank and Ohio Nationals Insurance Co. Telephone Call with Attorney Losier regarding roofing estimates. Correspondence to Primak Partners for back up documentation.	1.10



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
6 Jan 2010

Invoice Number 720501  
Page 2

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
		Review invoices and pay bills. E-mails regarding visits by Sharyn and regarding note with Sharyn's name on it along with Gary Frost's name and number. Review visitation discrepancy in requested times of Sharyn and Linda. E-mails from and to Brad Eklund regarding visit and care giver coverage.	
12/02/09	MVS	Communicate w/ Quality Roofing re: previous estimate of Ms. Eklund's roof; communicate w/ Atty Losier re: all roofing estimates.	0.20
12/02/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding opposing counsel's request for documents concerning Bragdon accounting; obtain documentation and e-mail documents to Attorney Cukier.	0.30
12/03/09	LMC	E-mails from RN Sobel-Medow and Brad Eklund regarding scheduling. E-mail to Dr. Tierney regarding Medical Certificate. Telephone Call with Dr. Tierney regarding South Dakota Medical Certificate.	0.25
12/04/09	DML	Attention to review of roofing issue and conf with Atty Samaral re: same; consideration of scope of work and any needed timing of repairs.	0.60
12/04/09	LMC	Review documents mailed by Mr. Gary Frost. E-mails regarding scheduling, health status and visits. Review contract and communications with Gary Frost. E-mail from RN Sobel Medow regarding scheduling care for upcoming week. E-mail from and to Paralegal Quinan regarding communication with Gary Frost.	0.80
12/04/09	MVS	Communicate w/ Quality roofing re: estimate; communicate w/ Atty Losier re: same.	0.20
12/04/09	SBQ	Telephone call from Mr. Frost regarding Maine lumber; e-mail to and from Attorney Cukier regarding telephone conference with Mr. Frost; file maintenance.	0.60
12/07/09	DML	Email exchange with Atty Cukier re: roof issues at Ms. Eklund's home; review M. Samaral email re: KMK Roofing.	0.40
12/07/09	LMC	Email from Mr. R. Eklund regarding visit on Christmas Eve Day; Email to family regarding scheduling around the holiday; Work on Motion for Payment; Emails regarding 2nd account; Emails from Ms. DeFabritis and RN Sobel-Medow regarding confusion of Mrs. Eklund and holiday scheduling; Work on schedule of visits	0.50
12/07/09	MVS	Contact Bradley Eklund re: additional roofing estimates while in town; contact J-n-R Gutters, Inc., Greylock Roofing Co., and KMK Roofing to arrange roofing estimates.	0.40
12/07/09	SBQ	Review and respond to e-mail from Attorney Cukier; work on	3.80



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
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6 Jan 2010

Invoice Number 720501  
Page 3

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
		second probate accounting; update reconciliation sheet for various accounts.	
12/08/09	LMC	Strategy email with paralegal Quinan regarding Account; prepare motions for service and filing; prepare Medical Certificate, Roger's Affidavit, Findings of Fact, Treatment Plan Order, Monitor's Report and Motion to Extend Roger's Order; review past orders and pleadings regarding same; prepare case for service on all parties and counsel; index pleadings and file notes; review memoranda to file; review receipts from Ms. Defabritiis; review correspondence from Ohio National; work on correspondence and Notice of Hearing in Roger's extension matter; emails with paralegal Quinan regarding likelihood of rejection of accounts for filing until Linda and Ron file first; correspondence and checks to Ms. Defabritiis; strategy discussions and calls regarding text in Account; emails to and from RN Sobel-Medow regarding continued telemonitoring; work on Motion to Accept Accounts as Rendered for filing.	2.90
12/08/09	MVS	Speak w/ estimator from J-n-R Gutters Inc. re: roofing estimate; update roofing contractor information sheet for file.	0.20
12/08/09	SBQ	Work on accounting; review and respond to e-mails from Attorney Cukier concerning accounting.	5.70
12/09/09	LMC	Emails regarding value for cost of telemonitoring and various programs available through Hallmark and prime care; deposit at Citizens; email to Ms. S. Eklund regarding upcoming visits; emails with paralegal Quinan regarding Manulife and other accounts; emails with paralegal Quinan regarding method of account for assets that Sharyn took control over without authority to do so, during the guardianship; email to RN Sobel-Medow regarding possible bank statement that may be sent to Woburn; discussion with paralegal Quinan regarding deposits; telephone conference with Ohio National; emails with Attorney Obinger regarding hearing date and data needed for filing, produce data and respond to same; email to Dr. Tierney regarding pleadings for his signature; emails with RN Sobel-Medow and Ms. Defabritiis regarding scheduling. (Actual time 2.25 - No charge at Citizen's Bank)	1.75
12/09/09	SBQ	(Bond issue) Telephone call from A.A. Dority regarding claim against bond; telephone conference to Attorney Cukier regarding same; review documents received from Sharyn Eklund.	0.80
12/09/09	SBQ	Work on accounting; telephone conference with Attorney Cukier regarding accounting; conference calls to Ohio National and ManuLife regarding information for accounting.	1.80



40945 Lisa M. Cukier, Guardian of Elizabeth Eklund  
00000 Guardianship of Elizabeth Eklund  
6 Jan 2010

Invoice Number 720501  
Page 4

<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
12/10/09	LMC	Visit Bank to obtain back-up documentation for Account (billed 1/2 time); correspondence to Peace of Mind; strategy conference with Attorney T. Howard regarding Sharyn's Motions; review health status update from RN Sobel-Medow; emails regarding educating Brad Eklund regarding food restrictions; telephone conference with Beth Thompson; emails with RN Sobel-Medow and Mr. Brad Eklund regarding Mrs. Eklund's diet and foods consumed during Brad's visit.	1.40
12/10/09	MVS	Communicate w/ representatives from Greylock Roofing and J-n-R Gutters, Inc. re: roofing estimates.	0.30
12/10/09	SBQ	Conference with Attorney Cukier regarding information obtained to complete accounting; work on accounting.	0.70
12/10/09	SBQ	(Bond issue) Telephone call from bonding company; conference with Attorney Cukier regarding information needed from bonding company pertaining to claim against bond filed by Sharyn Eklund.	0.40
12/10/09	TH	Conference with Attorney Cukier and Paralegal Quinan regarding latest developments and preparation for 12/18 Status Review.	0.10
12/11/09	LMC	Email from Ms. S. Eklund regarding visitation schedule; read Motions, Affidavits, letters and pleadings of Ms. Sharon Eklund; email to Attorney T. Howard regarding oppositions to Ms. S. Eklund's motions; review account of guardian; edit and refine same for clarity of events; email to Attorney Cushing regarding Sharyn's Motions.	1.10
12/11/09	SBQ	(Bond issue) E-mails to and from Attorney Cukier regarding claim against bond.	0.10
12/11/09	SBQ	Work on second account; conferences with Attorney Cukier regarding information for second account; e-mail draft accounting to Attorney Cukier.	5.00
12/14/09	DML	Email exchange with Atty Cukier and Atty Samarel re: Sharyn's motions set for Friday; review roof proposal.	0.40
12/14/09	LMC	Status update to Attorney Losier regarding Motions of Sharyn Eklund; review correspondence from Care Mark; strategy conference with Attorney Howard regarding oppositions to motions of Sharyn Eklund; Put Attorney Losier on Notice of Motions; strategy conference with paralegal Quinan regarding accounts; email from Attorney Cushing regarding hearing on Friday; status update from Ms. Defabritiis regarding fluid in crease and chest x-ray; email follow up to Ms. Sobel-Medow; review correspondence from Attorney Beth Thompson regarding Hancock policies.	0.90



<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
12/14/09	MVS	Communicate w/ J-n-R Gutters, Inc. and KMK Roofing re: estimates conducted and immediate need for any repairs; communicate information and estimates to Atty Cukier and Atty Losier.	0.40
12/14/09	SBQ	Conference with Attorney Cukier regarding accounting matters; instructions to administrative staff regarding filing fee for Petition to Expand Conservator's authority; work on accounting.	0.80
12/14/09	TH	Review multiple Motions, Petitions, and Affidavits filed by S. Eklund for Hearing on December 18; Conference with Attorney Cukier regarding strategy for responding to same.	1.20
12/15/09	LMC	Telecon with RN Kerry Davis regarding weight gain and pulse rate and increased dosage of diuretic; email from and to Attorney Olinger regarding status of Hughes county matter; telephone conference with Attorney R. O'Reilly regarding Mrs. Eklund's status email from Ms. Defabritiis; final review of and edits to account; conference with paralegal Quinan.	0.80
12/15/09	SBQ	Prepare face page for account; finalize account; conferences with Attorney Cukier concerning issues involving account; e-mails to and from Attorney Cukier; finalize petition to expand authority of conservator; prepare Attorney Cukier for hearing; telephone conference with Attorney Cukier regarding Rule 1:07 statements; conference with Attorney Cukier regarding service of account on interested parties.	2.20
12/16/09	DML	Email exchange with Atty Samarel and Atty Cukier; review emails; follow-up re: estimates on roof work and related issues.	0.30
12/16/09	LMC	Attendance at Middlesex Probate. File account. Obtain 3 certified decrees. Telephone Calls with RN Sobel-Medow and Ms. Lucy regarding hospitalization. Review correspondence from John Hancock. Telephone conference with Attorney Benson regarding Ron's position. Email information and strategy discussions with Attorney Howard regarding responses to Sharyn Eklund's package of motions.	1.90
12/16/09	MVS	Communicate w/ Brad Eklund re: roof leaks noticed while staying at 11 Washington Terrace 12/8/09-12/10/09; communicate w/ KMK roofing re: previously submitted estimate and necessary addendum; prepare summary of all roofing estimates for Atty Cukier.	0.70
12/16/09	SBQ	Review and respond to e-mail from Attorney Cukier regarding certificates; obtain certificates from Attorney Cukier; conference with Attorney Cukier regarding hearing.	0.20



<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
12/16/09	TH	Research regarding procedure for filing suit on fiduciary bond in Superior Court; Draft email memorandum to Attorney Cukier regarding same; Review roofing estimates and memorandum from Attorney Samarel; Review various other emails and documents in preparation for responding to S. Eklund's various pleadings; Conference with Attorney Cukier regarding strategy; Draft Opposition to Motion for Independent Medical Examination; Draft general Response and Opposition to all other pleadings; Draft Affidavit of Attorney Cukier in support thereof; Draft email memorandum to Attorney Cukier regarding responsive pleadings.	2.80
12/17/09	LMC	Telephone conference with RN Sobel-Medow and Dr. Khan at MGH regarding case and medical status; telephone conference with Attorney O'Reilly regarding Mrs. Eklund's condition; review check from Hancock; review bank statement; action planning for petition to expand authority; review correspondence from ManuLife; review correspondence from Attorney Cushing with check; work on oppositions for Court tomorrow; assemble and prepare documents and exhibits for Court; review roofing materials, Rule 1:07, requests for bank data; review status updated regarding hospital course and medical care from RN Sobel-Medow; review pleadings and correspondence from Attorney Olinger; email confirmation to Attorney Olinger.	2.80
12/17/09	SBQ	Update pleading index with recently filed documents; conference with Attorney Cukier regarding hospitalization and potential placement of Mrs. Eklund in a nursing facility and need to expand powers of guardian.	0.40
12/17/09	TH	Conference with Attorney Cukier regarding final responsive pleadings and strategy for 12/18 Hearing.	0.10
12/18/09	DML	Follow-up email from Atty Cukier re: hearing today.	0.20
12/18/09	LMC	Hearing at Middlesex Probate; follow up to file; status updates with RN Sobel-Medow regarding course of hospitalization and discharge planning options; telephone conference with S.W. Abby MacDonald regarding care plan, family dynamics, discharge plan.	2.50
12/18/09	SBQ	Review e-mail; conference with Attorney Cukier regarding hearing.	0.10
12/19/09	LMC	Emails, text messages and telephone conferences with Mr. Montessino, RN Sobel-Medow and Ms. Defabritiis regarding storm coverage.	0.40
12/21/09	LMC	Status update with Mr. R. Eklund and Mr. B. Eklund; arrange with Mr. R. Eklund for snow blowing; review Ohio National check; review and sign correspondence to BNY Mellon; review medical	1.10



<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
		records from Dr. Tierney; forward same to RN Sobel-Medow; status update from MD at hospital; status update from RN Sobel-Medow; status and strategy conference with Paralegal Quinan regarding service of South Dakota pleadings on the parties; email with Ron Eklund regarding Christmas Eve visit.	
12/21/09	SBQ	Conference with Attorney Cukier regarding South Dakota property; e-mail Attorney Olinger regarding service on interested parties of South Dakota appointment; assistance to Attorney Cukier regarding information for telephone conference with Social Security.	.040
12/22/09	LMC	Emails from and to Atty. Olinger regarding Sharyn's Motion to Continue S.D. hearing. Multiple telephone calls with Dr. Courtright, prime care, Angela Micozzi and discharge team. Arrange for service of Notice. Work on Emergency Motion and Petition for Transfer. Email from Ms. S. Eklund regarding Motion to Continue hearing in S. Dakota. Emails with Ron Eklund regarding holiday visit schedule and continued stay at MGH. Telephone call with Lucy Brandao regarding service on Mrs. Eklund. Emails to and from Atty Olinger regarding service on Mrs. Eklund by Sheriff and regarding Sharyn Eklund's opposition to hearing date. Meeting with Lucy Brandao at MGH. Emails to Atty. Olinger. Review caremanagement correspondence. Correspondence to RN Sobel-Medow and Mr. R. Eklund with a prescription tag card. Pay invoices.	3.80
12/22/09	SBQ	Review e-mail from Attorney Olinger; e-mails to and from Attorney Cukier regarding service on Mrs. Eklund in hospital; telephone call to Sheriff's office; prepare authorization of service; instructions to administrative staff; telephone calls to and from doctor regarding signature on authorization; prepare emergency motion for nursing home placement; finalize petition to expand guardian powers to allow for nursing home placement.	3.20
12/23/09	LMC	Meeting with Angie Micozzi and Abby MacDonald at MGH regarding Mrs. Eklund's care and need for a longer term acute hospital stay at Youville hospital. Meeting at Middlesex Probate Court with Judge Monk's secretary Maura regarding court's Order on Motion for Fees. Telephone call to Social Security office. Emails with Atty. Olinger regarding next steps to oppose Sharyn Eklund's Motion to Continue. Work on Affidavit of Lisa M. Cukier. Telephone calls with MGH and Youville regarding transfer of Mrs. Eklund. Nasty email from Ms. L. Defabritis. Emails regarding scheduling. Emails with Brad Eklund.	3.90



<u>Date</u>	<u>Tkpr</u>	<u>Narrative</u>	<u>Hours</u>
12/24/09	LMC	Visit Mrs. Eklund at MGH. Meeting with continuing care, nurse and social worker Abby MacDonald. Brief encounter with Ron Eklund. Brief encounter with Linda Defabritis and Sharyn Eklund. Follow up telephone calls regarding discharge plans to Youville. Telephone call with Hector Mantesino regarding coverage. Email status with Kerry Dams, RN. Email status update to Jamily. Emails with Ms. Defabritis regarding Sunday coverage. Appearance at Middlesex Probate Court with Petition to Expand Authority and Request to Judge Monks for scheduling override.	2.00
12/28/09	LMC	Status update by telephone conference to RN Sobel-Medow. Telephone Call with Winchester Savings Bank to follow up on production of documents. E-mail from Brad Eklund supporting sale of South Dakota land to South Dakota relatives. Respond to same. E-mail to Attorney Olinger. Deposit at bank. Telephone Call with Attorney Olinger. Payment of invoices. Review care giver schedule. Review options of RN Sobel-Medow.	1.00
12/29/09	LMC	Arrange for service of pleadings regarding nursing home authority; review order on Motion for Payment of Fees; review court order for payment of fees; email from Attorney Olinger; respond to same regarding Marvin Shumaker and value of real estate; review Attorney Olinger's opposition "Resistance" to Sharyn's Motion or Continuance; status update from Deputy Sheriff's Office regarding return of service; email to Attorney Olinger regarding same; telephone conference with Case Manager at Youville/Spaulding for update on care and treatment consents; review invoices and determine allocation of payments; detailed emails from and to Attorney Olinger regarding Sharyn's communications with court.	1.10
12/29/09	SBQ	Review e-mails relating to sale of South Dakota property; telephone call to Suffolk sheriff's office to inquire on status of Return of Service on South Dakota summons; e-mail to Attorney Cukier regarding status.	0.30
12/30/09	LMC	Extensive telephone conferences with Dr. Thompson; review emails from RN Sobel-Medow with health care status updates and scheduling issues; emails from Judge in South Dakota denying Sharyn Eklund's motion to delay hearing; emails from and to Attorney Olinger regarding Sharyn Eklund's correspondence to Judges and accusations; review order of Judge Barrett; review email from RN Sobel-Medow regarding status and emails from Ms. Sharyn Eklund, Ms. L. Defabritis and Mr. B. Eklund regarding transition from MGH to Youville; review discharge summary from MGH; forward same to Attorney Olinger; review correspondence	1.90