

McLAUGHLIN, RICHARDS, BILLER & SCHINDEL, LLP

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Jmclaughlin@southnaticklaw.com

June 7, 2017

VIA EMAIL

Mr. Michael Elbery

elbery@roadrunner.com

RE: Email dated 5/30/17

It is surprising that you have received all of the prior emails but now seem to have a problem receiving the most recent email.

Also, you are wrong again regarding the Land Court form. I mailed a copy of Land Court form to you and everyone else on May 11, 2017 requesting all to sign to transfer the property to all five named individually. You have refused to sign.

I am enclosing herewith a copy of the Probate Inventory, First Probate Account, Petition for Allowance of Account.

Also note that I was not required to file an Account until one year after the date of my appointment which was May 31, 2017.

James A. McLaughlin

hm

enc.

cc/Ms. Joyce Elbery


cc/Mr. Robert Elbery

cc/Ms. Kathleen Elbery

cc/Mr. David Elbery

cc/William Crowe, Esq.

elberym-email60717

INVENTORY	Docket No. NO15P1491EA	Commonwealth of Massachusetts The Trial Court Probate and Family Court
	Norfolk  Division	
<input checked="" type="checkbox"/> Estate of: <input type="checkbox"/> Conservatorship of: <input type="checkbox"/> Other: June E. Elbery		

After completing attached Schedules of Personal Property and Real Estate, insert the total from each Schedule on the line below.

- I am the Conservator who is Temporary Permanent
 Personal Representative
 Special Personal Representative
 Public Administrator
 Receiver
 Other: _____

appointed on May 31, 2016 (date) and I certify that this Inventory contains a complete and accurate report of the estate's personal property and real estate.

FOR CONSERVATORSHIPS

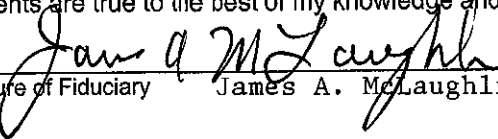
I have delivered a copy of this Inventory by delivery in hand first class mail postage prepaid to the Protected Person (if over 14) and to any parent or guardian who lives with the Protected Person

SUMMARY OF ATTACHED SCHEDULES	
(If you are completing this on-line, the totals will auto-fill.)	
	TOTALS
SCHEDULE OF PERSONAL PROPERTY:	\$62,735.30
SCHEDULE OF REAL ESTATE:	None

SIGNED UNDER THE PENALTIES OF PERJURY

I certify under the penalties of perjury that the foregoing statements are true to the best of my knowledge and belief.

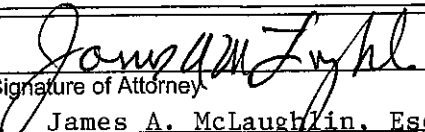
Date: May 10, 2017


Signature of Fiduciary James A. McLaughlin, Esq.

Date: _____

Signature of Co-Fiduciary (if applicable)

Information on Attorney for Fiduciary


Signature of Attorney James A. McLaughlin, Esq.
(Print name)

8E Pleasant Street (Address) (Apt, Unit, No. etc.)
So. Natick MA 01760 (City/Town) (State) (Zip)

Primary Phone #: 508-653-3300

B.B.O. # 337120

Email: Jmclaughlin@southnaticklaw.com

SCHEDULE OF REAL ESTATE

Item No.	Description of Real Estate	Value
1	168 Fairfield Street, Needham, MA 02492	
	Norfolk Registry of Deeds Certificate of Title 52275	\$641,000.00
	Total	\$641,000.00

Note: INCLUDE THE STREET ADDRESS, TITLE REFERENCE, AND CURRENT BALANCE (IF ANY) OF ANY MORTGAGE OR LIEN FOR EACH ITEM OF REAL ESTATE. "Value" in the right column means fair market value without deduction for any mortgage or lien on the property. If necessary, attach additional pages, continuing with Item No. 15 etc. until completed. Enter total values of all Real Estate items above, and insert same amount on "Schedule of Real Estate" line on front page of this Inventory.

SCHEDULE OF PERSONAL PROPERTY

Item No.	Account and Number	Description of Personal Property	Value
1	Checking Acct. #5869	Santander Bank	\$ 23,883.02
2	Money Market Acct. #7176	Santander Bank	\$ 36,852.28
3		Model Train Collection	2,000.00
4	Personal Property		Undetermined
Total			\$62,735.30

Note: LIST CURRENT BALANCE (IF ANY) OF ANY LOAN OR LIEN ON EACH ITEM. If necessary, attach additional pages and continue with Item No. 15 etc. until completed. Enter total values of all Personal Property items above, and insert same amount on "Schedule of Personal Property" line on front page of this Inventory.

ACCOUNT	Docket No. N015P1491EA	Commonwealth of Massachusetts The Trial Court Probate and Family Court
<input checked="" type="checkbox"/> Estate of: <input type="checkbox"/> Conservatorship of: <input type="checkbox"/> Other: <div style="text-align: center;">June E. Elbery</div>	Norfolk	Division

This is the 1st & Final (1st, 2nd, etc.) ANNUAL
 FINAL ACCOUNT
 AMENDED

FOR THE REPORTING PERIOD FROM May 31, 2016 TO June 8, 2017
(MM/DD/YYYY) (MM/DD/YYYY)

If Final Account, indicate why: Appointment terminated Estate closed Judicial Order
Summarize the financial activity below after completing the detailed accounting information in Schedules A, B and C. Attach additional sheets if necessary.

Notice to Interested Persons. Interested persons have the responsibility to protect their own rights and interests within the time and in the manner provided by the Massachusetts Uniform Probate Code, including the appropriateness of disbursements, the compensation of fiduciaries, attorneys, and others, and the distribution of estate assets. The Court will not review or adjudicate these or other matters unless specifically requested to do so by an interested person, the Personal Representative, or the Conservator.

Personal Representative's/Conservator's Information

Name: James A. McLaughlin
First Name MI Last Name

Address 8E Pleasant Street So. Natick MA 01760
(Address) (Apt, Unit, No. etc.) (City/Town) (State) (Zip)

SUMMARY OF SCHEDULES	
(If you are completing this on-line, the totals will auto-fill.)	
	TOTAL
SCHEDULE A - Receipts and income:	\$ 87,018.90
SCHEDULE B - Payment and debts, administration expenses, taxes and distributions:	\$ 35,752.49
SCHEDULE C - Balance of assets on hand:	\$ 51,266.41

SCHEDULE A- RECEIPTS AND INCOME

If this is the first Conservator's Account filed, use the balance from the Inventory to complete item 1 below. Otherwise, use the total amount of Schedule C (Book Value) from the prior Conservator's Account to complete item 1 below.

Item #	Date	Description of item received, include name of Payor	Sub-Total	Amount Received
		Balance of Inventory or Prior Account	60,735.30	
1.	12/31/16	Interest Accrued 6/1/16--12/31/16		167.12
2.		Discover Card		42.73
3.		MA Estate Tax Refund		11,988.00
4.	3/2/17	2017 Interest Accrued		57.01
5.		Train Set (appraised)		2,000.00
6.		Contribution by David, Kathleen and Joyce for Pro Rata Estate		
8.		Tax Apportionment due from Joyce, David, and Kathleen to be deducted from distributive share		12,028.74
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			Total	87,018.90

SCHEDULE B- Payment of Debts, Administration Expenses, Taxes & Distributions

Item #	Date	Description of item Paid (include Name of Payee)	Sub-Total	Amount Paid
1		Bank check fee	275.00	275.00
2		MA Estate Tax Estimate	10,275.00	10,000.00
3		Charles RO Trains (appraisal)	10,775.00	500.00
4	12/31/16	James A. McLaughlin	17,881.25	7,106.25
5		Probate Court Account Fee	17,981.25	100.00
6		Probate Account Petition	18,056.25	75.00
7		Probate Court Bond Fee	18,131.25	75.00
8		Kathleen Elbery (train)	20,131.25	2,000.00
9		David Elbery*	24,140.83	4,009.58
10		Joyce Elbery*	28,150.41	4,009.58
11		Kathleen Elbery*	32,159.99	4,009.58
12		James A. McLaughlin	35,752.49	3,592.50
		* Pro Rata Contribution to Estate Tax		
			Total	35,752.49

SCHEDULE C- Balance of Assets on hand at end of accounting period

Item #	Account and Number	Name of Financial Institution or Description of Asset	Market Value	Book Value
1.	#5869	Santander Bank		
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27.				
			Total	

Protected Person's Information

Name: _____ Age: _____
First Name MI Last Name

Current Address: (Include Name of Nursing Facility, if applicable)

(Name of Facility if applicable)

(Address) (Apt. Unit, No. etc.) (City/Town) (State) (Zip)

1. Is there a continued need for the Conservatorship? Yes No

If No, describe why and what steps should be taken. If you would like the Court to take action, you must file the appropriate pleadings with the Court.

2. Are the remaining assets in the estate sufficient to provide for the present and future care of the protected person?

Yes No

If No, describe why and what steps should be taken. If you would like the Court to take action, you must file a motion with the Court.

3. List the services provided to the protected person.
- _____
- _____

4. Recommended changes to the Conservator's Plan, if any:
- _____
- _____

The Conservator's Account pursuant to G.L. c. 190B §5-418 must be filed annually and served on all interested persons and on the Protected Person (if over 14) and to any parent or guardian who lives with the Protected Person.

All Fiduciaries

I state under penalty of perjury that this is a true and complete report of the administration of this estate, during the period shown, both dates inclusive, to the best of my knowledge, information and belief. I understand that this Account is subject to audit and verification.

I understand that I am required to maintain supporting documentation for all receipts and disbursements including detailed billing statements from any professional. The Court or any Interested Persons may request copies at any time.

Date June , 2017 _____
James A. McLaughlin SIGNATURE OF FIDUCIARY

Date _____
SIGNATURE OF CO-FIDUCIARY (if applicable)

Attorney for Fiduciary:

James A. McLaughlin

Print Name

8E Pleasant Street

(Address)

So. Natick MA 01760

(City/Town) (State) (Zip)

Primary Phone #: (508) 653-3300

BBO No.: 337120
