

**Keetia Harris**

---

**From:** Twila A Bollinger  
**Sent:** Saturday, March 20, 2010 6:32 AM  
**To:** Susan H Novak  
**Cc:** Keetia Harris  
**Subject:** RE: Max Hopper Estate

We look forward to this new estate!! I will be the tax accountant on this one.

Please forward date of death when you get a chance.  
Also, please inquire on the status of the 2009/1040

Thanks,  
Twila

-----Original Message-----

**From:** Susan H Novak  
**Sent:** Thursday, March 18, 2010 1:46 PM  
**To:** Wendy W Besette  
**Cc:** Fran Barone; Twila A Bollinger; Keetia Harris  
**Subject:** RE: Max Hopper Estate

Wendy - see the other email I just forwarded to you and others involved with this new estate. I think we should proceed and take this intestate estate - all family members are hopefully going to sign off on us becoming Indep. Administrator and to our fee schedule. I have discussed our fee schedule and that I do not want to have to use the TX Probate Code as I am not sure how much of the \$14MM estate assets I can bring into the new estate. The Code only lets us have a 5% of in and out's of the receipts and disbursements. See TX Code 241 and 242 if interested.

Max Hopper owned several hedge funds, was a director of several companies so has stock options, a venture capital account, and other interesting investments. The surviving spouse knows all of the assets as she was the involved administrator of everything while he was alive so it does not look like there are any surprises out there..only that he did not have a will. She states that there is a \$10MM liquid fund also. This will be a very time intensive estate due to family relationships and assets.

We will start the KYC and NBM soon so you can review.

Susan

Susan Novak | Sr. Fiduciary Officer | Private Wealth Management | Estate Settlement Unit - Dallas | J.P. Morgan | 2200 Ross Ave., 7th Floor, Dallas, TX 75201 | T: (214) 965-3465 | F: (214) 965-3725 | [Susan.H.Novak@jpmchase.com](mailto:Susan.H.Novak@jpmchase.com)

-----Original Message-----

**From:** Wendy W Besette  
**Sent:** Wednesday, March 10, 2010 2:16 PM  
**To:** Susan H Novak  
**Subject:** RE: Max Hopper Estate

CONFIDENTIAL

1  
**PLAINTIFF'S  
EXHIBIT  
4**

**DEPOSITION  
EXHIBIT  
4**  
WENDY BESSETTE - 04/5/2016  
exhibitsricker.com

**EXHIBIT  
A**

IA 020776

Great, this will hopefully be a good one. I was shocked at TX intestate law regarding surviving spouse/kidws from different marriage.

-----Original Message-----

From: Susan H Novak  
Sent: Wednesday, March 10, 2010 1:15 PM  
To: Wendy W Bessette  
Subject: RE: Max Hopper Estate

Yes, we are going to meet with the surviving spouse tomorrow am...I know the Dallas attorney also. I will update you when we return from the meeting.

Susan

-----Original Message-----

From: Wendy W Bessette  
Sent: Wednesday, March 10, 2010 12:47 PM  
To: Susan H Novak  
Subject: FW: Max Hopper Estate

You are working on this with Kal?

-----Original Message-----

From: Bill Bogart  
Sent: Wednesday, March 10, 2010 4:30 AM  
To: Kal X Grant  
Cc: Michael A Horlick; Todd A Baird; Wendy W Bessette  
Subject: Re: Max Hopper Estate

Sounds like a terrific win

----- Original Message -----

From: Kal X Grant  
To: Bill Bogart  
Cc: Michael A Horlick; Todd A Baird; Wendy W Bessette  
Sent: Tue Mar 09 22:33:07 2010  
Subject: Max Hopper Estate

Bill--

Just an fyi-- it looks like JPM is going to be asked to accept appointment as independent administrator for the estate of Max Hopper by both Jo Hopper and her (apparently contentious) stepchildren. It's yet TBD what total flows will be, but fees should be at least \$100K (maybe up to \$160K) if we end up taking the estate.

I'll fill you in when you're back in the office.

Kal Grant  
Wealth Advisor  
Private Wealth Management  
J.P. Morgan  
(214) 965-3497