

# EXHIBIT A



ESTATE PLANNING RESOURCES

~~REDACTED~~ 459

To: Jake Conley

From: Ed M Jr.

Mr Conley-

The annuity company requested the following letter to be sent to them. Please sign and fax to me (785-2723). I'll fax it to them.

Please call 785-2700 w/ any questions. (Your home line was busy).

~~Ed M Jr.~~

archive

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**From:** Alex Gueorguiev  
**Sent:** Tuesday, October 06, 2009 1:58 PM  
**To:** 'Edward Maggiacomo'  
**Cc:** archive  
**Subject:** RE: ~~XXXX~~7859 / John Conley

I know...but I think we are pushing it now. They are paying extra attention due to all the stop payments and re-issues.

Thanks Ed.

Alexandre Gueorguiev Jr.  
LifeMark Securities Corp.  
Registered Representative  
400 West Metro Financial Center  
Rochester, New York 14623  
585-424-5672  
Member FINRA/SIPC

Don't forget to check [www.lifemark.com](http://www.lifemark.com) for the latest news and upcoming events.

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**From:** Edward Maggiacomo [mailto:EdM@eprworld.com]  
**Sent:** Tuesday, October 06, 2009 1:48 PM  
**To:** Alex Gueorguiev  
**Cc:** archive  
**Subject:** RE: ~~XXXX~~7859 / John Conley

I will try to get a new one signed, but every other LOI I have sent in under the same circumstances was accepted.

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**From:** Alex Gueorguiev [mailto:alexg@lifemark.com]  
**Sent:** Tuesday, October 06, 2009 1:15 PM  
**To:** Edward Maggiacomo  
**Cc:** archive  
**Subject:** RE: ~~XXXX~~7859 / John Conley

Ed,

They don't like the LOI because it does not ask request that the payee be John alone.

Please provide new one.

Thanks

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**From:** Edward Maggiacomo [mailto:EdM@eprworld.com]  
**Sent:** Tuesday, October 06, 2009 10:12 AM  
**To:** Alex Gueorguiev  
**Cc:** archive  
**Subject:** RE: ~~XXXX~~7859 / John Conley

Alex,  
Mr Conley received the replacement check this morning. Unfortunately, it was made payable to both him and Sandra Bulpitt, his deceased joint account holder. The original check request was made with it payable to him (only). When I wrote (below) to have it reissued "as originally requested", I probably should have made it clear that it be made payable to him (only). Unfortunately, we have to have them reissue again (to him only) and overnight it again. Please advise.  
Ed

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**From:** Alex Gueorguiev [mailto:alexg@lifemark.com]  
**Sent:** Monday, October 05, 2009 2:38 PM  
**To:** Edward Maggiacomo  
**Cc:** archive  
**Subject:** RE: ~~XXXX~~7859 / John Conley

The check was sent overnight. I will follow up tomorrow with a tracking number.

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**From:** Edward Maggiacomo [mailto:EdM@eprworld.com]  
**Sent:** Monday, October 05, 2009 10:56 AM  
**To:** Alex Gueorguiev  
**Subject:** RE: ~~XXXX~~7859 / John Conley

Please have NFS stop payment, reissue as originally requested, but overnight it to the address of record so that we may track it.  
Ed

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**From:** Alex Gueorguiev [mailto:alexg@lifemark.com]  
**Sent:** Monday, October 05, 2009 11:00 AM

To: Edward Maggiacomo  
Cc: archive  
Subject: RE: ~~XXXX~~7859 / John Conley

Hey Ed,

John just called me saying he still has not received his check.

What would you like to do?

Thanks.

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From: Alex Gueorguiev  
Sent: Wednesday, September 30, 2009 11:45 AM  
To: 'Edward Maggiacomo'  
Cc: archive  
Subject: RE: ~~XXXX~~7859 / John Conley

Ok...I agree.

Thanks Ed.

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From: Edward Maggiacomo [mailto:EdM@eprworld.com]  
Sent: Wednesday, September 30, 2009 11:33 AM  
To: Alex Gueorguiev  
Subject: RE: ~~XXXX~~7859 / John Conley

Let's give it a few more days. If they don't get the check, we'll stop payment, reissue and overnight. The client can afford the extra charges.

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**From:** Alex Gueorguiev [mailto:alexg@lifemark.com]  
**Sent:** Wednesday, September 30, 2009 10:52 AM  
**To:** Edward Maggiacomo  
**Cc:** archive  
**Subject:** RE: ~~X8908~~7859 / John Conley

Hi Ed,

The check is still outstanding...it has not been returned to NFS.

It did go to the address of record. The money desk suggest we wait for today's mailing and then make a decision.

We have a couple of options:

1. We can wait and see if it is returned to NFS. If this happens...NFS will void the check and reissue a new one. However, we can't be sure that it will ever be sent back.
2. We can put a stop payment on the outstanding check and issue a new one...this is a \$20 charge to the client. If you want...we can pass the \$20 charge to you.

I apologize for the mess...but that's the postal service for you.

Please advise.

Thanks.

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**From:** Edward Maggiacomo [mailto:EdM@eprworld.com]  
**Sent:** Wednesday, September 30, 2009 10:23 AM  
**To:** Alex Gueorguiev  
**Subject:** ~~X8908~~7859 / John Conley

Alex,

I received a call from the above client this morning. He has yet to receive the \$408,000 check that was processed on 9/18 from his LM/NFS account. Could you please contact them and check the status. Thanks.

Ed

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Edward L. Maggiacomo, Jr., CFP  
Estate Planning Resources

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Cranston, RI 02920  
401-785-2700

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