Outlook

Re: Oppenheimer Weiner Complaint

From Jordan Weiner <jordan@internetconsultinginc.com>
Date Thu 4/18/2024 4:04 PM
To Wade, Patrick <Patrick.Wade@opco.com>; Nona Ullman [redacted]
Cc Terri P Tepper [redacted]

Hello Wade,

You are correct. I didn't realize the credit back to the account wasn't a debit (on both instances). Thank you for clarifying.

In the letter being sent to Terri - please be aware that we know my father (Lawre) sent a letter authorizing the fee increase to Jerry (without any of our knowledge at the time), however his mental decline because of his Parkinson's and stage 4 lung cancer should have resulted in the decline of any increase of fees as a fiduciary.

Thank you again for your time and efforts.

Jordan T. Weiner
President
Internet Consulting, Inc.
281-961-4002
Jordan@internetconsultinginc.com
www.internetconsultinginc.com
Also Co-Founder of
children's educational business:
www.howtobegoodforsanta.com
www.childrensbehavioreducation.com

From: Wade, Patrick <Patrick.Wade@opco.com>
Sent: Thursday, April 18, 2024 3:40 PM
To: Jordan Weiner <jordan@internetconsultinginc.com>; Nona Ullman [redacted]
Cc: Terri P Tepper [redacted]
Subject: RE: Oppenheimer Weiner Complaint

Mr. Weiner,

A written response to the previously received letter will be sent via FedEx to Terri Tepper as she is the sole beneficiary on the accounts. I anticipate the response being sent out tomorrow or early next week.

I will include a response to this allegation in the letter. However, I will take a moment to advise that this figure and the figure mentioned regarding account XXX-XXXX969 ($12,427.32) are both incorrect. I am not sure how you are calculating these numbers. Perhaps you are just reading the account statements incorrectly. I am not

sure. Please see below.

XXX-XXXX395 – $1,133.05 was charged, but did not take into account the fee increase. The $1,133.05 was then credited back to the account, and the account was then charged the correct amount of $1,767.56. Total amount charged was $1,767.56

01/22/2021	MGMT FEE01-01 TO 03-31-2021	0.00	-1,767.56	0.00
01/22/2021	MGMT FEE01-01 TO 03-31-2021	0.00	1,133.05	0.00
01/13/2021	MGMT FEE01-01 TO 03-31-2021	0.00	-1,133.05	0.00

XXX-XXXX969 – $3,490.82 was charged, but did not take into account the fee increase. The $3,490.82 was then credited back to the account, and the account was then charged the correct amount of $5,445.68. Total amount charged was $5,445.68.

01/22/2021	MGMT FEE01-01 TO 03-31-2021	0.00	-5,445.68	
01/22/2021	MGMT FEE01-01 TO 03-31-2021	0.00	3,490.82	
01/13/2021	MGMT FEE01-01 TO 03-31-2021	0.00	-3,490.82	0.00

The balance of Oppenheimer & Co. Inc.'s position regarding this matter will stated in the aforesaid response being sent to Ms. Tepper. In the event Ms. Tepper has any further questions once the response is received, she should call Mr. Mygatt. You and/ or Nona Ullman can be on the call as well, as long as Ms. Tepper is also on the call.

Sincerely,

Patrick Wade
Executive Director
Oppenheimer & Co. Inc.

From: Jordan Weiner <jordan@internetconsultinginc.com>
Sent: Thursday, April 18, 2024 4:09 PM
To: Wade, Patrick <Patrick.Wade@opco.com>; Nona Ullman [redacted]
Cc: Terri P Tepper [redacted]
Subject: Re: Oppenheimer Weiner Complaint

[External Email – Exercise Care]
Hello Wade,

Please add the following to the long list of what looks like deceptive practices:

On account XXX-XXXX395 there were three Jan 2021 through March 2021 management fees Totaling $4,033.66.

How long do you believe it will take you to finish your internal investigation?

Kindly email us a date and time that you will be calling 281 961 4002 to hopefully resolve this.

Thank you,

Jordan T. Weiner
President
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Jordan@internetconsultinginc.com
www.internetconsultinginc.com
Also Co-Founder of
children's educational business:
www.howtobegoodforsanta.com
www.childrensbehavioreducation.com

From: Wade, Patrick <Patrick.Wade@opco.com>
Sent: Monday, April 15, 2024 11:13 AM
To: Nona Ullman [redacted]
Cc: Jordan Weiner <jordan@internetconsultinginc.com>; Terri P Tepper [redacted]
Subject: RE: Oppenheimer Weiner Complaint

Confirmed

From: Nona Ullman [redacted]
Date: Friday, Apr 12, 2024 at 2:16 PM
To: Wade, Patrick <Patrick.Wade@opco.com>
Cc: Jordan Weiner <jordan@internetconsultinginc.com>, Terri P Tepper [redacted]
Subject: Oppenheimer Weiner Complaint

[External Email – Exercise Care]
Dear Mr. Wade,

Can you please confirm receipt of our letter?

Thank you,

Nona

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