

Tish Leroy memos

TISH
MEMOS

TERRI,

B-1-B-1a

FROM TISH**WE SENT A LOT OF HER STUFF
TO TOWN TO BE MAILED. IT CAME IN AT
THE LAST MINUTE AND NOT TIME TO EVEN
SEE IT. I ASKED PAULA TO CLEAR HER
LETTERS TO VARIOUS RESEARCH PLACES.
SO WHO KNOWS? WHAT WAS THERE. HERE
IS ONE COPY. CL

B-1-B-1a

13. 11/16

BE SURE YOU SEND CHURCH DONATION LETTER ACKNOWLEDGING THE AMOUNT THEY G
 THESE RETURNS NEED TO BE SIGNED, PHOTO COPIES MADE INCLUDING COPIES
 OF THE W2'S. Please return the photocopies to Tish in next batch
 of papers coming down to Terri and Maria. Please put Tish's name on
 all tax matters, these sometimes set for a while if not clearly designat

Name	Pays	Line 64	Refunds:
Mike Klingman		(871.00)	\$(48.21)
Patricia A. Martin	\$ Pa \$211.	(1152.26)	
Gina Kay Severns		(358.00)	(84.00)
James R. Randolph		(545.38)	(158.13)
Hattie M. Newell		(447.45)	(55.00)
Brian Kravitz		(324.20)	(113.90)
Verlina Hollins			
Vadia L. Fairley	\$ Pa \$64.53	(676.46)	
Laurie B. Efrein		(709.41)	(33.83)
Joann K. Davis		(908.22)	(43.00)
Jean F. Brown		(1909.29)	(86.00)
Doreen K. Greaves	1976 \$ Pa \$99.	(1880.00)	(7.00)
June B. Crym		(54.00)	
Florida M. Johnson		(1185.00)	(23.00)
Phyllis Houston	(CHECK W/ TAX COUNSEL TO BE SURE OF TYPE OF INCOME... E)	(357.00)	(46.00)
Brenda Y. Jones		(828.00)	(179.49)
Jerry L. Wilson	\$ Pa \$145.	(2945.00)	
Kathy Purifoy Richardson		(561.00)	(3.84)
Jim McElvane		(585.01)	(120.53)
Doreen K. Greaves	1976	(1507.00)	(77.78)
Sandy Bradshaw		(598.13)	(191.55)
Paulette Jackson		(55.10)	(20.00)
Sue Ellen Williams Galling		(804.00)	(62.00)
Alfreda Saffold	\$ Pa \$25.53	(401.00)	

Those involved should check their returns carefully. Remember
 there is no problem filing late IF YOU HAVE A REFUND COMING..so
 if there is a question, send it back down to me with a note of
 explanation. Do not let tax consultant there make final decision
 UNLESS WE HAVE DISCUSSED IT AND YOU TOLD YOU THIS IS HOW TO
 TAKE.. we will spell it out, if so.

Tell Vernell we want to send her to Doyle again.. she has moved
 to Fremont now...There is a big manila brownish envelope about 2 inches
 thick with tape on it has Vernell's tax papers in it... or some of
 Vernell's papers may have on it the woman's name and address. I will
 try to locate it for her.

IF YOU QUESTION POLICY ON THIS, DO SEND DOWN IN DAD'S case with the
 next person coming down and hold on mailing returns.. OTHERWISE, GET
 THE TAX LETTER FROM THE CHURCH TREASURER -- I know that in all cases
 it was more than we have listed, but you will have to check their records
 for that. The letter should list the amount we show--whatever it is..
 including their checks, envelopes and cash offerings that you have notation
 of... I know some cash was put in envelopes besides the tithe envelopes.
 so you should have a record of this. They had said they committed to
 50% but know that it always runs more with the cash offerings. Please
 include what you show. I recall last year in checking -- it ran 5-10%
 higher than they had committed to in the group of tithers.

Thanks... Tish

B-1-B-16

TO: JUNE CRYM
FROM: Fish

B-1-B-2a

Response to portions of law office reports. . .

Report #7-12/22/77

Item 1 - Tell Harold to go ahead and list the sale of house..the \$15,000 capital gains should not be a problem since he was not working last year and lived with friends much of the time. \$7500 of this becomes taxable income. He is allowed up to 50% as a gift to church, or \$3750... $\frac{1}{2}$ of the total income.. This leaves \$3750 taxable. With his wife, Loretta, himself and children as deductions there should be no tax.

As a matter of fact, where they lived off of their former monies, and savings - the treasurer can verify he turned over the entire check to P.T., she has recall of this and the check itself could be recalled if need be. Where he acted as agent for the church, and had actually signed the deed to P.T. many months before, and kept none of the money - I think Ed did nothing wrong in so advising Harold. However, if that bothers him - then tell him to take the capital gains as above - and should be no tax.

Item 2 - Recommendation on Truth Enterprises sales tax report: Do get the reports filed for 77 along with the \$15 for reinstatement: Note you should send letter to St Bd in Ukiah letting corporation lapse as of 12/31/77 and ask for refund of deposit on file at Bof A Ukiah \$250.

Take a copy of the letter of donation of assets and equipment (not detailed) signed by Chaikin and as documented in the minutes of P.T. corporation as received. Thereafter, include this equipment on the PT insurance. SEND LETTER OF ADDITION TO INS CO AFTER YOU HAVE PHONED FOR THE COVERAGE AND GOTTEN ACCEPTED. then send verification letter, certified mail-return receipt requested, verifying the phone coverage agreed to. FIRE INS ESPECIALLY, water damage, vandalism, etc.

(Bonnie) Take out sales tax permit in Ukiah - Tell Mr. Venter that she is handling the sales operation only, that Bonnie will be handling the books and working from the church in valley. Take out the permit as P.T., dba Valley Publishing Co. - tell him Mr. Chaikin signed the business over to P.T. and we are getting our printing done "outside" by commercial printers, but buy our own paper to save \$\$ and Bonnie is handling orders, and all merchandise out of her valley home.. that we no longer have the presses ...being used by the publishing co., but are sub-bing out our printing...too expensive now that Mr. Chaikin no longer around to handle it for us. He is traveling.

ON YOUR REPORTS - do not list sales, but list under the USE section...but get a SALES & USE TAX LICENSE..."in case" you sell some to Goodlett. We make no profit on what we do for him, so is not a problem. We charge him sales tax on the cost to us.

YOU MUST MAINTAIN the resale # in order to get discounts at Zellerbach and other big suppliers. "Their licenses do not allow selling retail in many cases. Best not to hassle it. We had trouble getting the accounts established to start with - to change to P.T. now would be most inappropriate. This answers (2b)

B-1-B-2a

Report #7-Item 2a: (This is the vitamin account) We are holding open ^{B-1-B-}
in case we want to get any more thru our wholesale contacts; must ²⁻⁶
buy in quantity thru these dealers, and MUST have wholesale number.
Must, however, pay use tax on we buy - and record with the
quarterly return. No reason to change locations since all sales
have been handled out of valley - and if we have any more, these
will be also...FILE A 4th Quarter return; sign as bookkeeper;
list: Nothing to report - but add a note to Mr. Venter telling
him we plan to start selling again...

Item 3 (Rpt #7) Believe this to be part of a major audit step-up on
ALL people by IRS...they were getting computers ready to do this
back in late 60's..intended to be auditing 50% of returns by 1975
and 75-80% by 1976-77 years, so think our people just fell into
the percentages.

CAUTION -

They either charge people with a "filing error" or a criminal
charge; the latter has to have some grounds, so they use the former.

Their procedure is to disallow all itemized deductions and compute
the tax on standard deductions..and call it an error in filing. Many
think they just owe it so do not question...Others think they did
something wrong so pay it and leave it alone. Those that bring in
their proof of deductions do not have to pay the additional.

All forms received for those down here must be sent on to Tish
immediately. If people are there, and are non-communalists, tell
them to protest the letter - give them a letter stating estimated
contributions to the church (June has form) and let them handle it
themselves. Tell them to take in their proof of deductions.

CODE
CAREFULLY

If not on a paying job or with assets to attach, judgment cannot
be believed against them...The crime is failure to "file" your returns
not failure to pay them. VERIFY THIS WITH THE TAX PERSON IN THE
OFFICE OF CHARLES GEARY. That is the law as Tish and Gene recall
it - unless this has changed.

In the event they have a job - then should go in and make arrangements
to pay off in 6-8 monthly installments - if in fact they do owe the
money.

CODE
CAREFULLY

(Carelyn - see my memo to JJ on this point...very serious
3a-Estimated contribution letter should be the legal one referring
to the theft in May 76; June knows about this report..Should
"not" use the letter I "think" June refers to...should be the
one from memory...and commitment pledged...)

If went over the 10% likely flagged the computer...church letter
should handle the problem. (CAROLYN NOTE -Monica Peterson's \$1400
was support for her son and not a contribution - she has some nerve
listing it.)

I do think they are over-reacting...

GLEVE'S PENSION is a disability pension, and is not taxable
income. It should not have been listed as taxable on the 76 return.

B-1-B-26

B-113-2c

DO NOT PAY ANY TAXES WE HAVE NOT SPECIFICALLY CLEARED FROM HERE. CHANCES ARE THEY ARE NOT OWED! Would be rare exception we would pay for them. We are not liable for their bills, and they have no means to pay them.

ITEM 3c CODE CAREFULLY

Do not refer to this paragraph by name of the corporation (Apos) rather, say: "in reference to Item 3c Report 7...LET IT LAPSE.. SEND NO FURTHER CORRESPONDENCE; DO NOT CONSULT ON THIS ISSUE WITH ANYONE*. Tax owed has been paid in full with all penalties due; will cost to dissolve, so just let it lapse - we have no further assets to spend. Is unimportant to do further on it - do nothing.

3c-re 199B... ED AND TISH NEED TO SEE COPY OF THE LAST RETURN FILED. Send it down post haste if June has copy; if no copy at hand, explain our books were stolen, along with tax records...could they please give us photocopy of last return filed...and will try to see what needs to be added for the next year. Get that down to Tish soon as possible...We had thought our former attorney had filed it - surprised it was not filed, will get it done post haste... We will get info from what we sent in to the Disciples. Have Bonnie send us a copy of what we listed with Disciples - this was published annually in the blue book...she should have a copy.

(CAROLYN: THIS IS IMPORTANT - we can lose church exempt status in California if these are not filed. Chaikin says not filed for 73, 74, 75, 76, 77...though Stone told "me" he had filed it. Do YOU June, have copy of the letter we got from Calif Franchise Tax Board last August?) (CAUTION: I TRUST WE KEPT IN MIND THE THEFT IN FILING WITH THE DISCIPLES FOR 76...)

Item 3c-paragraph 3: ACTION EQUALITY: do not know the corporation structure. If not a foundation, and if officers are in no way criminally liable for failure to dissolve, then Tish agrees.

Item 3c paragraph 4: PEOPLES FORUM INC **CAUTION** do not refer by name. Paper is published by PT and not by the corporation..so not a problem. Let it lapse, Chaikin advised.

Office Report #8

Item 2 - Irene Edwards 941 employers return...HAROLD CAN SIGN THIS AS HER BOOKKEEPER...Sau that there is nothing to report...that they let their patients go and had only couple left during first quarter and they (Edwards) did all their own work...no employees to report. Sold house in April of 77. This is not likely to be questioned if phrased simply, NOT well phrased - as though some not-too-bright person wrote it out...They simply had no employees in this period. She does not have to personally sign a 941... I have signed hundreds of them as bookkeeper, across the years and no problems.

Report #9

Item 1 - Truth:

As of Dec 31, 1977 - agree should give P.T. the assets and equipment... LIST THEM; accept them in a corporate resolution and minutes; GIVE THEM IN CORP. RESOLUTION AND MINUTES IN TRUTH CORPORATE BOOKS...

B-1-B-2c

B-1-B-2d

GET THE INSURANCE COVERED IMMEDIATELY IN COVER LETTER TO INS COMPANY ...
phone first and record (tape) the conversation acknowledging coverage...
say the equipment came in on 1st of January 77 - that we were storing it
there for Chaikin, and he decided to give it to us...or some such...don't
say when it came into building...You can enclose a photocopy of the
PT corporate minutes LISTING ITEMS RECEIVED...for their records, and it
should be dated as of Jan 1, 1977...you will probably get charged ins.
as of that date...but DO GET IT INSURED IMMEDIATELY, FIRE, WATER DAMAGE,
VANDALISM etc.. If costs extra on P.T. policy, get it covered anyway...
Of course JJ WILL HAVE TO CLEAR IT...but I cannot imagine us not having
this covered with the constant threat of being burned out. KEEP THE "
INSURANCE UP ON ALL CHURCHES "IF POSSIBLE," UNTIL ESCROWS ARE CLOSED AND
CHECKS ARE IN OUR HANDS...Then, be very careful not to cancel out "all"
churches when you cancel one...I would use REGISTERED LETTERS OF CONFIRMATION
of what is agreed, and request written memo of insurance from agent and the
policy...which should be kept out of the church in a fireproof vault
at bank.

We are too susceptible to fire bombs and the like now...

WE DO NOT HAVE TO LIST "INCOME" FROM A BUSINESS unless we receive it.
Can file Valley Publishing Co. as a registered DBA of Peoples Temple.
On the sales tax form, list USE tax and no sales..."we intend to get to
it - but haven't had time yet..." Sales office is in valley - Bonnie handles

(CODE CAREFULLY CANNOT SAY IT) PROBLEM WITH GETTING A SALES TAX PERMIT
OUT OF SF...IS THAT WE THEN HAVE OSHA COMING IN TO CHECK ON THE EQUIPMENT..
OUT OF REDWOOD VALLEY, THEY DO NOT KNOW WHERE EQUIP IS...AND I DON'T THINK
VENTOR TOO INTERESTED OR HAS THOT OF THIS...Maybe have Bonnie get a new
permit # in Ukiah and don't get one in SF...Use church address...I have
DELIVERATELY NOT GOTTEN PERMIT AT SF ADDRESS BECAUSE OF OSHA...THEY ARE
BASTARDS, AND WOULD NO DOUBT COME OUT TO CHECK ON US, WITH ALL THE
PUBLICITY WE HAVE NOW HAD...

"IF" you change status and let Truth corp. lapse... no longer record as
"sales"-see my paragraph on change of bookkeeping procedure...list in a
journal, the items we buy - can set up in the CASH OR CHECK REGISTER...as
sales taxes payable...it will be on ALL ITEMS...we have no exemption on
sales taxes...

1a-no, (CAROLYN READ - CAUTION - DON'T SAY IT OUTRIGHT!) Only the Osha
problems above listed. If we take permit out in Ukiah...Osha may or
may not come looking for equip...then just say this is the office we expect
to do sales from (church)...as unrelated business income...will "farm"
out the printing...WE DO NOT MENTION OWNING THE EQUIPMENT TO HIM...WE ARE
STARTING A PRINTING BUSINESS AND STATIONERY SALES, income to go to church -
will have various members selling and all profits to church...Not so easy
to say that in SF...they might come out and find equipment. Anyway in SF
fire marshall knows equip has been there some time.

1b-no: It never makes any sales - and DON'T...on what you bill Goodlett,
list as REIMBURSEMENT OF COSTS...only...then list that portion as
sale...but you have made no profit; it says right on invoice...so you
are covered...LIST NO LABOR CHARGE ON INVOICE...Materials only reimb.

B-1-B-2d

Report #9

Item 1c--No--do not list as a business. It is our equipment and we print our church printing on it...don't say what that printing includes..just call it church printing. Unrelated business income is only involved if there IS BUSINESS INCOME...What we get from Goodlett is only reimbursement of our costs...and no profit, so we do not list it nor do we file an unrelated business income return...No income, no return. A-1-B-2e

Item 1d--Many very large companies will not give individual "implant" operations the same prices they give to actual businesses operated for retail sales...MANY WOULD NOT EVEN DEAL WITH US...This is why we set up truth to start with...to get the discounts. Stationery outfits are the worst to deal with in this area...they want the extra money unless you are a bona-fide printer "for sale..."

Clancy surely must remember problems we have had in this relation... this would mean setting up new charge accounts, etc... you really DON'T WANT TO TAKE THAT ROUTE::: Many of the wholesalers are licensed to sell ONLY TO RETAIL OUTLET BUSINESSES...so could then not even sell to a non-resale business...They "might" do it - but would lose their license if they got caught.

B-1-B-2d

January 78
To: Jim
Fr: Balkey

17-1-A-2

Tax Filing & Returns Status

Truth Enterprises: Corporation solely owned by Chaiken. Should be allowed to lapse & equipment & supplies donated to the church. If Truth should be kept open- we ll have to pay \$200.00 for 1978 as well as 1977. Betty was to have filled in the forms and sent in the return-but if the information was in the file cabinet she will have to fabricate a reutrnr.

Handwritten initials

Tish has no 77 tax information on Truth. The information will come from Kathy Tropp & Clancey for filling in form of sales info.

Suggestion from Tish: That the stock should be sold and transfered to some one else. He owns all our printing equipment as he is the owner.

Chaikens suggestion: The transfer of stock is restricted by California Corp. Commissioners and will be an unnecessary hassel if considering a transfer.

We need to donate all aspects to PT; which can be done by bill of sale and let the rest of it go.

Truth is a subchapter S Corporation: gets priveledges of a partnership yet gets filed as a corporation.

Procedure: File returns with no \$-then file the copy with Chaikens personal returns-thus you either pay tax due or take the loss.

Chaikens tax-man in LA had his 75 returns done but he needs the 76 & 77 followed thru on.

Robert Wicks CPA
11340 Wset Olympic Blvd
LA 90064

Bufred would know how far Wicks has gotten. She should check with him and see what is happen ing and see if he is waiting for anymore informa tion.

Chaikens Suggestion: Authorize Bob Wicks to sign returns. Bufred can get the forms from him for that purpose.

Tish wants to reley traffic :

Do not transfer to S.F. Would require filing a half percent increase more. keep in R.W.V.

B-1-B-2F

Quality
Action 0

Section 293

Statement says
let it be!

[Handwritten signature]

PF

Not done for the
question to 21st of last
to respond
medical school a legal
book dist. sent to
letter of conference.

Report # 2

Richard Case
On 15 of all little
when 3 yr old
of father's
shown unpt.

boy
since baby
in custody

Father latter want grandma to
have letter to

Michael Daniels - Anne Mae Harris

father signed all papers

B-1-B-29

13. 1. 1.
2

Relics & Things:

DBA of PT
Should have had final return filed for April.
Tish recalls filing-but can not remember if
deposit was refunded.

There was a deposit on former Relics Account
which Chaiken was to have gotten released-
Tish thought perhaps about \$500.00.

Chaiken thinks that he had it released. Someone
will have to check with Bank of America in Ukiah
and ask what type of document they want to re-
lease the funds. Perhaps Bonny Beck could find
out.

Sandy Parks was a signatory on the account.

Apostolic Corp:

Dont pay \$200 this year. We are letting it lapse.
Leave it alone-no more use to us.

The trust deed that is being collected on it now-
was assigned by Lois Ponts to Apostolic Corp so
that what she got from her sale of house would be
automatically deposited.

Chaiken suggestion: Apos Corp needs to assign it
either to Lois & have the check sent here -or-
assign it to PT. The best thing would be to assign
it to Lois and have it transferred here. Thus avoiding
tax implications between Apos.&PT

June should find out who the officers are-we can
get them together and have them sign forms for re-
assignment authorization.

Form called: Assignment of Note & Deed of Trust

**Check Cashing
& MO Services:**

Not a corporation: DBA of PT. No returns necessary.

Valley Enterprise: Registered DBA of PT.

Used for separating construction costs from other
PT expenses.

No income & No Profit (not true)

Thus no taxes necessary & no returns to be filed.
Thats why no Tax ID # was filed. So that they would
not have us registered & more easily accessible with
our working figures.

B-1-B-2h

FB-17-2K

Peoples Temple Co-op: Registered DBA of PT
Has papers attached for 77 returns.
Needs the last quarter return filled in
Tish Suggestion: Perhaps should consult
with legal finance counsel.

Copys of DBA forms were in possession of June
Harriet & Chaiken. Consult with June on what
has happened with them.

If using sales tax ID #-hold open by filing
return stating:

Nothing to report
No Sales.

This can be filed every quarter for a year or
monthly according to which one we are filed
with. June will have to check that out also.
This way we can still get vitamins wholesale.
If we dont want to get anymore vitamins-
Close out.

Request refund of deposits on all sales tax acts
In some cases deposits were \$250.00
Because PT Co-op is a subsidiary of PT we do
not have to file tax return.
If anyone should ask-say that it had no income.
Things were sold at cost to poor members.

2 Political Corp: SF equality Action
Peoples Forum

Equality action: Doing nothing with them. Paying no \$.
Letting lapse

Peoples Forum: Was a corporation which functioned a couple
of times several years ago. Then the church
started publishing the paper.
Let Lapse
It is not closed
Dont pay money on it.

B-1-B-21

Boy P
③ turn to Alford Smith - sweet
hostile family

④ both sisters born in same town
hostile at husband
sister thinks they should leave
before husband get legal rights
- divorce

⑤ [unclear] [unclear]

B-1-B-2c

B-1-B-2j

15-8-1-A

TO JUNE CRYM

From Tish

Response to portions of law Office Reports...

Report #7-12/22/77

R-1-17-3a

Item 1- Tell Harold to go ahead and list the sale of house..the \$15,000 capital gains should not be a problem since he was not working last year and lived with friends, much of the time. \$7500 of this becomes taxable income. He is allowed up to 50% as a gift to church, or \$3750... of the total income.. This leaves \$3750 taxable. With his wife, Loretta, himself and children as deductions there should be no tax.

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Item 2-Recommendation on Truth Enterprises sales tax report:
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B-1-B-3a

B. IR
36

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I do think they are over-reacting...

CLEVE's PENSION is a disability pension, and is not taxable income. It should not have been listed as taxable on the 76 return.

B-1-B-36

B-1-B-7c

DO NOT PAY ANY TAXES WE HAVE NOT SPECIFICALLY CLEARED FROM HERE. CHANCES ARE THEY ARE NOT OWED! Would be rare exception we would pay for them. We are not liable for their bills, and they have no means to pay them.

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Do not refer to this paragraph by name of the corporation (Apos) rather, say: "in reference to Item 3c Report 7... LET IT LAPSE.. SEND NO FURTHER CORRESPONDENCE: DO NOT CONSULT ON THIS ISSUE WITH ANYONE * ~~XXXXXXXXXXXX~~. tax owed has been paid in full with all penalties due; will cost to dissolve, so just let it lapse -- we have no further assets to spend. is unimportant to do further on it - do nothing.

3c-re 199B... ED & TISH NEED TO SEE COPY OF THE LAST RETURN FILED. Send it down poste haste if June has copy; if no copy at hand, explain our books were stolen, along with tax records..could they please give us photocopy of last return filed..and will try to see what needs to be added for the next year. Get that down to Tish soon as possible.. We had that our former attorney had filed it --surprised it was not filed, will get it done poste haste... We will get info from what we sent in to the Disciples. Have Bonnie send us a copy of what we listed with Disciples-this was published annually in the blue book... she should have a copy.

(CAROLYN: THIS IS IMPORTANT--we can lose church exempt status in California if these are not filed. Chaikin says not filed for 73,74,75,76,77... though Stone told "me" he had filed it. Do you June, have copy of the letter we got from Calif Franchise Tax Board last August?) (CAUTION: I TRUST WE KEPT IN MIND THE THEFT IN FILING WITH THE DISCIPLES FOR ax 76...)

Item 3c-paragraph 3: ACTION EQUALITY: do not know the corporation structure. If not a foundation, and if officers are in no way criminally liable for failure to dissolve, then Tish agrees.

Item 3c paragraph 4; PEOPLES FORUM INC **CAUTION** do not refer by name. Paper is published by PT and not by the corporation..so not a problem. Let it lapse, Chaikin advises.

B-1-B-3c

(18) Item 3c-paragraph 3... Action Equality: do not know the corporation "structure".. if not a foundation, and if officers are in no way criminally liable for failure to dissolve, then I would agree.

(19) Item 3c paragraph 4.. Peoples Forum, Inc. Note that Peoples Forum paper is published by Peoples Temple and not by Peoples Forum Inc, so Chaikin advises us..

(20) If in fact this is so -- he declares just let it lapse, since no activity.. Same as for paragraph 3.. of section 3c... depends on corporate structure..

(21) IF WE DISSOLVE, HOWEVER, those who might "assume" the forum is published by Peoples Forum Inc.. and not P. T. might question it. we do not want to get into sales tax issue... AVOID THAT... see the comments on Truth for closing it off 12/31/77... P. T. owns equipment after that date, and the truth records thereafter should show COST FIGURES ON INVOICES AS PURCHASED...

(22) Instead of a sales journal, keep those records just for information of materials used on each job... but as materials come in without tax... MAKE A PHOTO of invoice and "log" it in a use tax journal... with cost amount and sales tax due at the 6 1/2% S.F. rate
CAUTION OF WORDING:

(23) IF IT IS LATER PROVED THAT TRUTH PRINTED FORUM "IN" SAN FRANCISCO, WE ARE LIABLE TO CITY FOR THE EXTRA 1/2% SALES TAX, AND PENALTIES OF UP TO THOUSANDS OF DOLLARS... is very precarious. I would "act" like the equipment was moved into the church on January 1, 1977.. and where Chaikin had it before that, we do not know and Chaikin is not available to ask.. We had "some" presses in there before --we just did church printing on those.. Chaikin bought those from us and sold to someone else we think.. so there would be room for the donated presses.. or some such CONFUSION... Cannot say we did not "have" presses there -- since a trip to the paper companies would show where any deliveries were made... so we farmed out the printing of forum and furnished our own paper at times.. bot thru truth...and Mr. Chaikin's kindness at no profit to him..did as church service, THIS IS TOUCHY AT BEST...

Why?
could be
but why?

Office Report #8--

(24) Item 2-Irene Edwards 941 employers return.. HAROLD CAN SIGN THIS AS HER BOOKKEEPER.. Say that there is nothing to report .. that they let their patients go and had only couple left during first quarter and they (Edwards) did all their own work.. no employees to report.. Sold house in April of 77.. This is not likely to be questioned if phrased simply, NOT well phrased--as though some not-too-bright person wrote it out..They simply had no employees in this period. She does not have to personally sign a 941...I have

N-117-3e

signed hundreds of them as bookkeeper, across the years and no problems.

Report #9
Item 1-Truth:

25- As of Dec 31, 1977---agree should give P. T. the assets and equipment.. LIST THEM; accept them in a corporate resolution and minutes; GIVE THEM IN CORP. RESOLUTION AND MINUTES IN TRUTH CORPORATE BOOKS...

26- GET THE INSURANCE COVERED IMMEDIATELY IN COVER LETTER TO INS COMPANY ..phone first and record(tape) the conversation acknowledging coverage.. say the equipment came in on 1st of January 77--that we were storing it there for Chaikin, and he decided to give it to us...or some such.. don't say when it came into building.... You can enclose a photocopy of the PT corporate minutes LISTING ITEMS RECEIVED..for their records, and it should be donated as of Jan 1, 1977.. you will probably get charged ins. as of that date...but DO GET IT INSURED IMMEDIATELY, FIRE, WATER DAMAGE, VANDALI etc... If costs extra on P.T. policy, get it covered anyway... Of course JJ WILL HAVE TO CLEAR IT.. but I cannot imagine us not having ~~it~~ this covered with the constant threat of being burned out. KEEP THE INSURANCE UP ON ALL CHURCHES "IF POSSIBLE," UNTIL ESCROWS ARE CLOSED AND CHECKS ARE IN OUR HANDS.. Then, be very careful not to cancel out "all" churches when you cancel one.. I would use REGISTERED LETTERS OF CONFIRMATION OF what is agreed, and request written memo of insurance from agent and the policy.. which should be kept out of the church in a fireproof vault at bank..

27- We are too susceptible to fire bombs and the like now...

28- WE DO NOT HAVE TO LIST "INCOME" FROM A BUSINESS unless we receive it. Can file Valley Publishing Co. as a registered DBA of Peoples Temple.. On the sales tax form, list use tax and no sales.. "we intend to get to it--but haven't had time yet..." *Sales office in Valley - Bonnie handles*

29- Check carefully
Caution
Don't let
the church
know
about
it
until
we
are
sure
we
can
handle
it

PROBLEM WITH GETTING A SALES TAX PERMIT OUT OF SF...IS THAT WE THEN HAVE OSHA COMING IN TO CHECK ON THE EQUIPMENT.. OUT OF REDWOOD VALLEY, THEY DO NOT KNOW WHERE EQUIP IS...AND I DON'T THINK VENTOR TOO INTERESTED OR HAS THOT OF THIS... Maybe have ~~State~~ Bonnie get a new permit # in Ukiah and don't get one in SF.. Use church address.. I have DELIBERATELY NOT GOTTE PERMIT AT SF ADDRESS BECAUSE OF OSHA...THEY ARE BASTARDS, AND WOULD NO DOUBT COME OUT TO CHECK ON US, WITH ALL THE PUBLICITY WE HAVE NOW HAD...

30- "IF" you change status and let Truth corp. lapse.. no longer record as "sales" --see my paragraph on change of bookkeeping procedure.. list in a journal, the items we buy --can set up in the CASH OR CHECK REGISTER..as sales taxes payable..it will be on ALL ITEMS.. we have no exemption on sales taxes..

Carolyn read - Caution - Don't say it outright!

31- la-no, only the Osha problem above listed. If we take permit out in Ukiah.. Osha may or may not come looking for equip..then just say this is the office we expect to do sales from (church)..as unrelated business income.. will "farm" out the printing...WE DO NOT MENTION OWNING THE EQUIPMENT TO HIM... WE ARE STARTING A PRINTING BUSINESS & STATIONERY SALES, income to go to church --will have various members selling and all profits to church...Not so easy to say that in SF..they might come out and find equipment.

32- lb-no: it never makes any sales --and DON't.. on what you bill Goodlet , list as REIMBURSEMENT OF COSTS..only...then list that portion as sale..but you have made no profit; it says right on invoice..so you are covered... LIST NO LABOR CHARGE ON INVOICE..Materials only reimb.

B-1-B-3e

A-1-A-31

Report #9

33 -

Item 1c--No--do not list as a business. It is our equipment and we print our church printing on it.. don't say what that printing includes.. just call it church printing. Unrelated business income is only involved if there IS BUSINESS INCOME.. What we get from goodlett is only reimbursement of our costs..and no profit, so we do not list it nor do we file an unrelated business income return... No income, no return.

34 -

Item 1d--Many very large companies will not give individual "inplant" operations the same prices they give to actual businesses operated for retail sales.. MANY WOULD NOT EVEN DEAL WITH US.. This is why we set up truth to start with..to get the discounts. Stationery outfits are the worst to deal with in this area.. they want the extra money unless you are a bona-fide printer "for sale..."

35 -

Glancy surely must remember problems we have had in this relation.. this would mean setting up new charge accounts, etc.. you really DON'T WANT TO TAKE THAT ROUTE!!! Many of the wholesalers are licensed to sell ONLY TO RETAIL OUTLET BUSINESSES.. so could then not even sell to a non-resale business... They "might" do it -- but would lose their license if they got caught.

B-1-B-35

B-1-B-4a

Re: [Illegible]

Re: [Illegible]

16 July 75

In re [Illegible] letter [Illegible]

(1st) Please advise that return was being mailed in and we have contacted one tax person who is presently out of the office. We will try to get access to the files to show a copy of the return and will send in a photocopy along with all schedules the corporation operated as a [Illegible] income taxes were due.

Re: [Illegible] and [Illegible]

[Illegible] This then necessitates a San Francisco business license, that with OSHA-INFO [Illegible] and operations, and it initiated an inquiry that never needs to happen. We are NOT CONDUCTING BUSINESS THERE AND SHOULD NOT PAY TAX. Our sales people and business [Illegible] is conducted in the valley and we are best to leave it there.

Our bookkeeper is [Illegible] and handles Mr. Chaikin's other affairs, and inadvertently listed the item through clerical error. She is not regularly experienced in these matters and our tax person had not yet reviewed the file to catch it. The bookkeeper had assigned it to one of her clerks who was not aware that Mr. Chaikin's business was in Mendocino County.

Be very understated in the letter and use a little "embarrassed" approach.

(3rd) I advise now (in light of what has transpired) to leave Truth as is with Gene's name on it. Then if we "do" get into it with [Illegible], the Chief Officer is out of the country.

[Illegible] that the insurance is valid... This agreement can include a clause that they agree to permit Truth the "use" of the equipment occasionally and as needed until their operation is suspended and the corporation disbanded.

While there is no problem, "perhaps," with the legality of a church corporation printing the items in question -- there might be the issue of unrelated business income... which opens up an invitation on taxes that we do not want to enter. So, I strongly advise against having Tony do the printing... as long as Tony MUST print -- keep the corporation intact and pay the sales taxes through Mendocino county.

In case of the church ceasing operations, if the corp. were suspended, you'd have to get a new sales tax permit.

B-1-B-4a

B-1-B-46

That opens the door to Inspectors, OSHA, etc. As long as the church is not conducting business and does its own printing -- the inspectors that "do" come by will not give too much trouble. If a business were to be operated there -- opens the door to toooooo much, especially with what has come down in the media!

To June and Jean: Most fond greetings to you two stalwart troopers. At best, bookkeeping is horrible -- when you are not atrained bookkeeper I know it is a living nightmare. However, your inquiries are very thorough, and from all I can see you are doing extremely well with what you have to do with...

Those of you there are constantly on our minds -- with the thought that you will soon be joining us here. Truly this is a lovely land, and the magnificence that our town is becoming can only be experienced. Dad works so intensely hard and a day never passes that he does not express his great concern and love for all of you there.

Give our Father's love and our fondest greeting to all of our loved ones there in S. F.

--Tish

B-1-B-46

B-1-B

Memo to Tom Buford

B-1-B-4c

Re Truth Enterprises Corp.

16 July 78

In re the 8 June 78 letter from US in re Truth

(1st) Please advise that return HAD BEEN MAILED in and we have contacted our tax person who is presently out of the city. We will try to get access to the files to secure a copy of the return and will send in a photocopy along with all schedules. The corporation operated at a loss so no income taxes were due.

Here the Law Office Report #35 pages 3 and 4 from June.

(2nd) I disagree strongly with what the San Francisco Business License that sets out the correct and operation... and it initiates an inquiry that never needs to happen. We are NOT CONDUCTING BUSINESS THERE AND SHOULD NOT PAY SO. Our sales people and business, little as it is, is conducted in the valley and we are best to leave it there.

Our bookkeeper is in S. F. and handles Mr. Chaikin's other affairs, and inadvertently listed the item through clerical error. She is not regularly experienced in these matters and our tax person had not yet reviewed the file to catch it. The bookkeeper had assigned it to one of her clerks who was not aware that Mr. Chaikin's business was in Mendocino County

is very un sophisticated in the letter and use a little "embarrassed" approach.

(3rd) I advise now (in light of what has transpired) to leave Truth as is with Gene's name on it... Then if we "do" get into it with St. Board, etc., the Chief Officer is out of the country.

IT IS IMPORTANT TO DONATE THE PRINTING EQUIPMENT TO TONY... can include a clause that Tony agrees to permit Truth the "use" of the equipment "occasionally and as needed" until their operation is suspended and the corporation disbanded.

WHILE there is no problem, "perhaps," with the legality of a church corporation printing the items in question -- there might be the issue of unrelated business income...which opens up an invitation on taxes that we do not want to enter! So, I strongly advise against having Tony do any printing..as long as Tony MUST print --keep the corporation intact and pay the sales taxes through Mendocino county..

IN ORDER FOR THE CHURCH to continue operations, if the corp. were suspended, would have to get a new sales tax permit..

B-1-B-4c

B-1-B-4d

That opens the door to inspectors, OSHA, etc.. As long as the church is not conducting business and does its own printing -- the inspectors that "do" come by will not give too much trouble. If a business were to be operated there -- opens the door to tooooooo much, especially with what has come down in the media!

To June and Jean: Most fond greetings to you two stalwart troopers.. At best, bookkeeping is horrible -- when you are not a trained bookkeeper -- know it is a living nightmare. However, your inquiries are very thorough, and from all I can see you are doing extremely well with what you have to do with...

Those of you there are constantly on our minds -- with the thought that you will soon be joining us here. Truly this is a lovely land, and the magnificence that our town is becoming can only be experienced. Dad works so intensely hard and I can never picture that he does not express his great concern and love for all of you there.

Give our Father's love and our fondest greeting to all of our loved ones there in S. C.

--Fish

ADDITIONALLY:

- 1) Discontinue operations of Truth as of June 30, 1978.
- 2) File final sales tax return and mark it final return.
- 3) The board of directors here will forward a resolution formally dissolving the corporation, and you can at that time file it with the Franchise tax board.. ~~XXXXX~~

24

I am in a rush to file the final sales tax return and mark it FINAL RETURN... Am ~~not~~ in no rush to notify franchise tax board...

Stop buying anything on the...

B-1-B-4d

B-1-B-5

Also our backtracking just days after we went to him in a state of frantic panic when we were under the gun from FCC and couldnt get him to agree that his statements about the bibles were corroborating with Olga's to Kelly. He sees us as operating always on a panic level, in defense against Baker and always harps on the need to take the offensive, not be so alarmist about things. He does not realize our basic strategy of acting before the fact, i.e. alerting press, etc. So when we change our instructions liek this, it causes him more trouble...and the most important factor--it causes him to lose face with his partnership, with whom he had to discuss the whole issue of accepting title for security. I am not agreeing with him, I am explaining this to you folks; I do understand the necessity for keeping title to the places and just working with Dr. Bedford faster. However, the above ~~xxxxxx~~ is informational.

- 10. Truth E. - this is what I tried to explain on the radio: we have 2 3 problems with Truth. ① The first is that we've received the attached series of letters from IRS, ending with the latest asking for us to come in and talk, but not saying about what. Walter is in the process of contacting IRS and finding out what it's all about. ② The second is that when Harold was here, he and Tish apparently had discussed the fact of including the computation of a San Francisco tax figure into the quarterly Board of Equalization reports filed on Truth. This was because the business was conducted primarily in the City; the use permit comes out of Mendocino County; the directions were nt to transfer the permit since that would cause problems; Harold said just before he went over to include the k SF BART SE tax, which is the add on of ~~xxxxxx~~ 1/2 of 1%, ~~xxxxxx~~ ~~xxxxxx~~ ~~xxxxxx~~ might question our operating in SF. Well, this was done, and now they sent us the attached letter asking why we have been figuring this in our quarterly reports. Walter advised us to just ansser that some business was conducted in SF and that is why the % was added in. We asked him if this was the Board's way of formally starting an inquiry into whether we were operating full time in SF. He disagreed. ~~xxxxxx~~ Before we write this letter, we are asking your advice whether to do it. Our next quarterly report is due around the first part of July for the past 3 months; we would like to send the letter out with the report.
- Finally, there seems to be an assumptin over there on Chet and Tish's part that we've gone ahead and transferred Truth to Tony. We only put the printing equipment on Tony's insurance policy. The phasing out of Truth was not done because we keep getting more income producing, obviously not church related, printing business, and we are still ~~waxi~~ waiting for Walter's analysis re the impact of printing political literature under church corp. As long as we keep the printing corp under Truth, then we understand we can continue printing political posters, books like Mary W.'s, stuff like that. If we lapse Truth and go to Tony, we are restricted by cntent. Obviously, this may all be ~~xxxxxx~~ irrelevant if we are to move the printing equipment out---but as of now, we've done nothing to transfer the corp to Tony.

Baker
Walter
Chet
Tish
Tony
Harold
Olga
Kelly
Dr. Bedford
FCC
IRS
BART
Mendocino County
San Francisco

never
done!

B-1-B-5

RELATIVE TO INCOME TAXES:

Dear Dad and Carolyn:

B-1-B-6a

IF THE FOLLOWING is in accordance with your agreement, please transmit the following suggestions and information stateside to the attention of June Crym and Jean Brown...as you see the need.

*Carolyn:
I need Dad's
okay on
item #1
#*

1) This morning, Chaikin and Harold and I discussed at some length the possibilities of my idea to UTILIZE some of the newer sections of the tax law. IN ESSENCE: we would take the maximum allowable contribution to church -- mail WITH THE TAX RETURN a letter of acknowledgment of the contribution attached to the tax form, this would constitute a receipt from the church to the individual which we do give at time of audit anyway and is not considered a problem...

BY UTILIZING "ONLY" the items on the form that IRS legally allows:

- a. The state income tax you pay--they check by computer;
- b. The % legally allowed for State gasoline tax;
- c. The % legally allowed for State Sales Tax; and
- d. The % legally allowed for contribution --substantiated by a receipt from the church sent and attached thereto along with the returns, to IRS. This leaves nothing else to audit...
- e. This gives us in the case of the high income bracket people, a much higher deduction and ending in a MUCH LOWER TAX, and thus a major refund...without any fear of audit.

Very good

I can see of no way where this can hurt us, nor can Chaikin. FURTHER, THERE ARE POSSIBILITIES we are now checking into wherein we might consider filing some amended returns relative to some of the donations to the church on properties in times past to get considerable kick backs. (Refunds of Tax paid)

In cases where the person has indicated MORTGAGE INSURANCE AND INTEREST PAYMENTS as deductions on prior year tax forms, the computers are designed to pick up when this deduction stops... meaning that in the case of Don and Bonnie Beck, where they paid interest in 1976 and none in 1977...the computer would pick up a SALE OF PROPERTY...which is taxable under capital gains law. THE LAW CHANGED ON THIS THIS YEAR and only 30% "calculable" portion can be taken in a given year, and balance is taxable to the individual --though there is a carry forward allowed so that the entire deduction can be taken over a period of five years forward. The contribution portion is figured thus:

This is used only when the donation is of the property, rather than the cash from the sale.

- a) Deduct your purchase price from sale price to get the appreciation of the property; less 50% for capital gains allowance. The balance is your taxable portion. 30% of this can be donated the first year, and over the next 5 years the entire gift can be deducted in graded percentages.
- b) Donations of CASH TO A CHURCH is separate and comes under a 50% maximum law --the PROPERTY CONTRIBUTION IS FIGURED SEPARATELY AND IS NOT INCLUDED IN THE 50% maximum allowable gift...

Gene and Harold and I cannot see where this could hurt us -- and Chaikin felt that if anything, under the tax investigation this would improve our case... he can explain the ramifications, since his idea and he will be talking with you about it, he said.

B-1-B-6a

t1 to JJ
Tax suggestions

B-1-B-66

2) RELATIVE TO BARBARA HOYER:

Her continuing to claim Tim Carter, Jocelyn and Mike as dependents --to me seems unwise: it in fact is fraudulent and could be proved SINCE TIM CARTER IS SO VISIBLY active in our headquarters. UNDOUBTEDLY all the names of active persons here are transmitted to the CIA control center in the states, and "at times" this information might or might not be checked with Tim Stoen; the HIGHEST BRACKET salary people would likely be the ones Tim Stoen would go after... He knows Barbara very well since she was his acting secretary for a time down at the DISTRICT ATTORNEYS OFFICES IN SAN FRANCISCO, and was paid by the city for the position while she held it... Both Tim Carter's names, and Barbara's would be known readily to Tim.

*K.N. work
agreed*

Should he see their names on tax returns and on the Georgetown report. I think she was safe prior to the 77 returns... as it would be most difficult to disprove the position we gave her-- especially after the fact... However, not so for 1977. I think fraud could be proved -- or at least a sufficiently strong case to greatly endanger her.

Chaikin and Harold are both FOR CONTINUING TAKING THE PERSONAL DEDUCTIONS OF THE RELATIVES on her married tax return... I do oppose this MOST strongly for the above reasons.

compute both ways and take the one that gives best results

In contrast to this, I would propose her filing a joint return with her husband, taking the allowable deductions for them, and utilizing the 50% contribution as indicated on page one of this transmission --which would give us MORE OF A TAX SAVINGS and would not endanger Barbara in any way that I can see.

3) Relative to Checking all returns out, and doing all returns from here...

a) CHECKING OUT RETURNS-- I am having Harold and Kay Nelson do the tax returns, splitting up between them the work that is to be done.

INDEPENDENTLY OF THEIR WORK, I am calculating the returns on a large spread sheet--listing names and Soc. Sec #'s and THEREAFTER using a column per "line #" on the return... so that in fact I calculate each return, separately and independently of their work...trying in this way to pick up all all errors, and all "possible" deductions that are legal. It is not likely that we will make the same mistake in same spot..

good

b) It is simple then to go one step further, with all of the vital information on the spread sheet (filing status, # of exemptions, 77 income, withholding taxes paid already, etc) TO GO ONE STEP FURTHER and calculate based on taking the maximum allowable CHURCH CONTRIBUTION... which I am doing, on the same spread sheet... so you will be able to see visibly just how much money we are talking about. It should be an appreciable amount!

B-1-B-66

Does June have the name of the How do they get signed

BY THIS SAME METHOD, use of the spread sheet, I am recommending that we calculate all returns from here--with only a few exceptions. ON ALL THAT SHE CAN, June can do the returns herself, by line #... we can relay our figures so that she can check her own calculations. WE CAN SEND OUT any we question

tl to JJ
Tax suggestions

4) # EACH PERSON THERE so that future transmittals can be coded...

ASAP
code

Possibly, June and Jean should send down a numbered list, immediately of all persons there, either coming down or staying -- on whom we might have reason to communicate.

Certainly would have to be sent by a reliable carrier in a group situation, certainly... not ruling out that a single carrier could be paid to let CIA go thru our case...(excuse my paranoia)...

The number classification could tell us possibly where the person is -- headwise-- relative to the organization...

Category A could be numbers 0-150
B could be numbers 200 series
C could be numbers 300 series, etc...

ONCE THE LIST IS HERE, and they have a "secured" copy there... we could then transmit a code # and monetary figure for income amount.... and the returns could be calculated...

I do not like this idea -- too likely to screw up, since wrong numbers etc -- communication best we do here -- all here in detail if needed in 4-5 days in country

CODE COULD SAY: School supplies #C-345 has 4 126 pieces to the puzzle; or catalog number 4,126... can be used in conjunction with: 327 --(327 representing the amount of withheld tax we would have to figure on the income of 4,126.) THE PERSONS social security # and amount of personal tax exemptions, age and marital status should be included in the list sent down.

Certainly this would have utilization in other areas of your transmittals as well... and other information could be included in the original list sent. FINALLY... the list there should include only the name and number -perhaps in reverse so not readily connected. THE ORIGINAL LIST could be deliberately dis-arranged so as to be not in alphabetical order. THEN, the names could be arranged "in" alpha order with the numbers reversed: alpha part of code=

A=Z, B=Y, C=X.... etc; or another less conspicuous method. Then #123 would be listed 321, or 213...consistently.

PREFERABLY --no one but one person there would understand the formula for reading the numbers...but the LIST in its revised form could be used by 2 or 3 there...if necessary.

THEN, June would write out the message from the existing list: the transmitting person would read it aloud TRANSLATED into its correct # sequence: i.e.

On June's list, Barb Hoyer would be X-321, Catalog number... The radio transmitter would read this C-123 on transmitting it to us. If the list there WERE CONFISCATED it would be hard to break if the original list was disarranged alphabetically, and the modified remaining list had the reverse coding and was subsequently arranged alphabetically... the numbers would then be out of sequence in their reversed state, so that a trained code-breaker would have a terrible time figuring the numbering arrangement if the original arrangement was a list totally disarranged from alphabetical sequence. THIS IS JUST A SUGGESTION: and very likely a much more sophisticated system could be worked out -- or already has been...

B-1-B-C

tl to JJ
Tax suggestions

B-1-B-6d-4

- 5) If you agree about Barbara, then perhaps you could convey to June, and get me her income, amount withheld by federal and by the state in income taxes... I can calculate the return very quickly and you can either transmit the reply by line# on the tax returns... or we can mail the calculations to June, or we can do both, as your best judgment might indicate.
- 6) Tell June that Harold brought with him the tax files he had been holding onto. There was information in it that had been sitting since early last year when I started Apostolic with Sandy.. and the taxes were turned over to Ellen Klingman and Harold... On about 35-40 tax cases, DONE on them. A few were items that Betty and I found that Ellen had squirreled --Buford should recall that issue... hoping we would have to call on her to save us when she was acting out in the states... So she would have been responsible for what was not done up until time I left... and at that time ALL TAX MATTERS WERE TURNED OVER TO HAROLD...so he has no recourse but his own responsibility from that point to this... When I confronted him on this, his response was that the work could be done HERE JUST AS WELL...which is not true since it would have saved MUCH TROUBLE had it been done there, and since in at least one instance...we lost a refund because the statute of limitations ran out...it had not run out until the end of the calendar year 1977... 12/31/77...

However, he is doing good work on what he is doing now... and he caught an item I erred on where I had not yet checked the code on something... it would have been caught in our double check system anyway, but he is at least being alert, and conscientiously working at this right now. He STRONGLY RESISTED showing me the letter on Barbara Hoyer, even with Chaikin sitting there--wanting to handle it alone with Chaikin. And I think they both erred in their recommendation on it --see my paragraph 1 of this letter..

This is my only concern with him here-- he hates to consult, and certainly I have been guilty of this in the past --but it is the reverse of what I am trying to remember to do here... since consultation and planning are natural resources, in a way, to the socialists.

Tomorrow, after I complete what I am presently doing, I will transmit to Carolyn or Buford, the exact responses to the questions June asks in her letter that referred to Doreen Greaves (a 76 return I gave Harold to do when Dorreen turned it in to me...since at the time I was working on Apostolic and could not handle it... He told me in the states it had been done...Here he "could not recall" --yet it appeared on his list he finally turned over to me when I demanded he bring in all the files he brought from the states, and make me a list of them and the status of each tax case.

7) TELL BETTY MC CANN to give to June ALL THE REMAINING 1977 "account" book information on the care homes. ALL OF THE CARE HOMES...including Janaro's... No one but me should do Claire and Richard's returns; tell Claire to file for an extension on April 15th...or 14th... not before that! I need income records, cash disbursements and check registers, along with the paid bills for the current year (1977) and the canceled checks.

8) IMMEDIATELY SEND all W2's on persons down here. Send them as they come in. Send photocopies of the W2's on persons there.

B-1-B-6d

OK
Nelson
5/14
5/14
5/14
5/14
5/14
5/14
5/14

~~B-1-B-6e~~

B-1-B-6e

To Dad --via
TERRI BUFORD:

*Important
Please*

B-1-B-7

In re CLAIRE JANARO -- a recommendation

In re their 76 taxes, these were done by Ellen and Harold -- I was not available, as I was buried in Apostolic from mid February thru mid August..

Am not aware of what "lies" in that material --have asked to have ALL THE TAX DATA SENT DOWN.

Recommendation:

Have Claire and Richard "SELL" the business to Don and Bonnie Beck.. the property is not an issue of sale, as it belongs to the church. For a "sum to be paid from their earnings," Bonnie can contract to buy the business. They can pay cash for the furniture and fixtures and have a clear bill of sale on this --not too high a price, though..as it is now old furniture... perhaps sell at undepreciated price...

A conditional contract --based on their income for the GOODWILL in the business.. Send their books and records ALL AHEAD TO US... then get Claire out of there! She is not the best person to send thru an audit.. Bonnie is sharp, but you don't act sharp with IRS.. you are better to be a disinterested person--as I was, "outside" of the connection with him

There are a lot of "cute" things we have pulled in that account, that would not be a problem to walk it thru audit if you know your way thru.. However, I don't know what Harold did.. have not seen the figures... nor the worksheets which are more crucial.

Then, I would ship Claire down here and quick sale the business to one of the big outfits that buy up places... IF POSSIBLE, to prevent government attachment --or the conniving of TOS on our assets.

She has an extension to file until June -- she should be out of there before that time, so that she can then write for an additional extension FROM GUYANA before the first extension is up... We can dilly dally and put it off..just not pay anymore there!

They couldn't block the sale that way of the property--(for Claire's interests), and if there is a statute of limitations, let it "out of the bag" that the ~~XXXXX~~ business was sold at the prior date (whatever) that Richard had left for South America and Claire had stayed behind to help them get training in the business, and did not want patients leaving which would have happened if they had known it was sold before getting to know the new owners...

I think it is worth consideration.

--"fish

NOW
I feel we should sell the ranch ~~now~~ for the best price now available... I don't know what risk with an audit but it surely would "be in" to C.T. tax concerns.

9- B-1-B-7

30 Mar. 78

R-1-B-8a

Dear Dad:

We are awaiting your response to the TAX MEMO... In an initial summary review of 27 returns, from lowest to highest incomes, mostly of persons still in the states, we would receive around \$23,400 in refunds with the 50% contribution figure used, and taking nothing as deductions that were not "allowed" on paper by government themselves... with the church tax letter attached, there would be nothing to audit..

Without the contribution listing, taking the straight tax table rate -- we would receive a total back of \$158 from the total 27 returns...

THERE IS THE FURTHER POSSIBILITY OF FILING SOME AMENDED RETURNS for prior years on some who did not use the full contributions... Chaikin's idea on this, I am not so convinced they will let us...THEY HAVE THE OPTION TO REFUSE, though do not usually refuse if you have a substantial argument...

IN LOOKING AT THE TAX LAW TODAY...both Harold and I noted the JEOPARDY ASSESSMENT OPTION the government has... It would certainly stand us in stead to go through a quick sale wherever possible, especially on the apt. building in Los Angeles... and SF church, if possible ... and the ranch...

It would be good if we could STIR UP SOME DIVERSIONARY TACTICS to pull their attention away from our properties and finances..while we are attempting the sales. You have used this method successfully in the past, and have probably already considered it.. so I just add my vote for the approach.

Am sure you already are familiar with the JEOPARDY law..where if they feel you will try to conceal, take assets out of country, etc., they can attach what you have... thru tax law maneuvers, bringing your fiscal year to close early, etc... Should be kept in mind, as I know you no doubt are already doing.

IN VIEW OF ALL THAT IS COMING DOWN, WE SHOULD PERHAPS, REASSESS WHAT WORK I SHOULD BE DOING... With Andrea Mardin down here now, perhaps she should be considered for a secretary to agriculture, along with Toi... OR...PUT ANDREA IN THE SCHOOL and put Inez Wagner in Agriculture. Either of them could sufficiently handle this office with help of Toi

I should possibly be pushing the projections, helping get the department structure set up (now doing it --but am too stretched out with addition of taxes to be effective in anything...) pulling in line the book work for farms, medical and warehouses... as well as getting our tax refunds, looking into the laws on social security, checking on those that do not yet have their retirement income collected, etc. We need a lot of letters out to get the W2's on people (so we can get tax refunds). They allow you 6 months or until June 15 on out of country citizens...but we will do better to file around April 15 with the "MOB" in hopes that an amateur hiree will process our paper and just send us our refunds... If we wait until June 15, and send into Philadelphia where the ALIEN, DUAL STATUS AND OUT OF COUNTRY EXPERTS ARE HOUSED...then I think they might be inclined to delay in sending our refunds, they might lose papers, etc... We have the returns done on all on whom we have W2's... and a list of many on whom we NEED w2's...

ALSO, MANY WHO WORKED in 1976 --have not responded to our plea to come in and give us the information so we can get out letters for the W2/s...there is TOO MUCH APATHY AMONG THE EATING-PEOPLE OF THIS FAMILY...about getting back this money for our collective. Harold and I talked about it and feel that if they FAIL TO COME FORTH NOW, and later a W2 wanders in --and they did not tell us, it should be automatic learning crew...

SOME, like Guy Mitchell had many jobs and made no listing--he said he had around 15 jobs in 77 alone in Texas before coming to San Francisco... As a former personnel person this

B-1-B-7a

is a red flag to me... It usually marks a person with either major personal problems, one unable to function well, too hot a temper, or... it is of course sometimes the mark of an agent... you know my everpresent paranoia, looking for the CIA to come out of the woodwork... but it is still worth bearing in mind. We have never had such trouble with out stock before, and he certainly volunteered fast for a person with no previous training...

Toi is doing well; she is learning shorthand, but it will be TIME before she could handle the minutes and radio followup... Andrea could handle that, and Toi could handle the other office records and procedures... I strongly recommend this. I will of course do my best to get done all I can...but presently it is more than I can handle. Probably half a day is all that it would take in office for Andrea or Inez... Inez is also to be strongly considered with her construction background... She is very knowledgeable about parts, etc., and handles people well. Inez would probably be an office, though she is presently in book depository. Inez also knows some bookkeeping, and wants to learn more --down the line, she could handle much of this for the farm and analysts, along with Harold.

Interestingly, Harold's sores are clearing up -- You are MOST KIND and loving, Jim... your tender mercy that forgives and eternally gives us another chance, is to me your most endearing trait... when we fall, we know it is worthwhile to get back up and go on... we learn from the fall, and are not demoralized from trying to improve. Certainly we can be more considerate one with another, as we cannot fail to perpetually observe your everpresent example.

Shawbyer - D-1-B-86
Love,
Jish

MEMORANDUM TO DAD
In re 1977 Tax returns
and June's Law Office Report #15

J. 1. 1. 92

From: Tish Lerey 16 March 1978

ISSUE:
Long forms &
receipts?

EXPLANATION:

I have checked through the changes in the tax laws; we do have the latest bulletins and tax law changes --and I have checked it CAREFULLY.

Error in input

June reported to Buford that she HAD TO FILE LONG FORMS, TAKE DEDUCTIONS AND ATTACH RECEIPTS... I CANNOT IMAGINE HOW SHE GOT THIS MISINFORMED... I CAN ONLY ASSUME (A FOUL WORD) that she called IRS herself and gave incorrect "input" or that she called a tax person and gave incorrect input.

SHE MIGHT HAVE ASSUMED OUR PEOPLE HAD DUAL STATUS; that is, that they were U. S. Citizens AND non-resident aliens... in which case we would have to itemize our deductions... however, I find nothing about attaching receipts--and I did search the books for this one as I had never heard of such a contrivance.

Our status

However, our status is U.S. CITIZENS LIVING ABROAD.. --and those at home are the same...

Outside tax
person & claim
church contribu.
of MAXIMUM allowed

ON PERSONS WITH HIGH INCOMES, LIKE DON BECK, BONNIE AND Jean Brown and perhaps June Crym... I recommend we send them to the woman who formerly did Rheavianna's taxes, and tell her that Rheavianna sent them... Her fees are reasonable and she does know the tax laws quite well... (see paragraph below)

ABSOLUTELY NO ONE SHOULD GO TO H. R. BLOCK.. who gives housewives a 6 weeks training course and turns them loose on an unsuspecting public, as any one in IRS is certain to know...

Harold-brot a
lot of unfinished
returns, including
short form items
not requiring
more than 10 min
to complete...
Dorene Greeves
among these

Some of the tax work I gave Harold when Sandy and I started Apostolic.. early in '77; I was over 4-5 months on it, finishing in August, 6th as I recall.. I gave him rest on my desk I had not gotten to in taxes when I left in September.. He brought it ALL down here, and I do mean all, in some cases losing a refund because 1977 lapsed without filing the returns.. not much \$\$\$ but some was lost. As near as I can see he did no returns --so am reluctant to let him do returns now, as he has made some heavy errors on them in times past. Yet, he sees it as a status thing, and wants to do them, I know--OBVIOUSLY.. He wasn't going to tell me about the things he had not done; I had to demand he bring in the tax material to me. And, if he even worked an occasional hour of overtime--I would feel more charitable.. Frankly I am extremely pissed at him! Yet, he is a socialist brother, and I incline to think his "sores" that are getting worse are a brooding over this tax thing... so

B-1-B-92

B. I. A. 96
though I do not feel he deserves to do returns, not that it is anything more than a bother--and I get out of them when I can... yet, I conclude he should be allowed to do them with me, BUT ONLY ON AN OVERTIME BASIS... I incline to tell him just that way, with your permission of course.

Proposal

Kay Nelson is also helping me on the returns. we had planned for her to sit in pavillion tonight and get additional information we need from some folks.

Becky and I have a socialism classto teach tonight.. but I propose the following: and it is more than fair, since I only had 3 hours last night, resting from 8:30-11:30; then back to office for rest of night and today... It is easier than getting up at 3 or 4 in morn. and I can do it couple days a week if there are not unexpected meetings...

I propose that Harold and I go to bed right after dinner or each as soon as they can make it--and sleep 3 hours then get up and go back into the office... and just work straight through... take another 3 hours from 5 pm to 8 pm tomorrow... then get up (missing rally --Toi and Margarita Romano can take minutes... I watched Margarita Monday at Steering setting in, and she listened well!) Harold and I can then work through until we finish... if still not close enough to "through" Saturday take 5 hours late in day and again work through night hours when there are no interruptions. Kay can help us in the hours she should and can work... She would want to work longer but Mother cautioned me about this.

We have about 60 stateside returns and 80 for those here (that we know of). Maria can type returns.. We can do them on a MASS SCALE--on an accounting tablet and then type them on the forms... I think we have enough forms... WE WILL NEED THE W2's sent down from states for those here... since they are mailed to Philadelphia and not to California.

THIS IS NOT NECESSARY... We could just do the stateside returns.. which I could get done almost all myself with Kay's help in the 2 days... but knowing you --we can also get most if not all of the returns for those here, excepting where we have no W2's from employers, in which case we can file an information return and request for extention (though automati cally they give you 6 mos to file instead of 4 (June 15 instead of April 15 --which is an extra 2 months) if you are out of the country...

I should not say knowing you--because none of us know your mind... but it does seem to ease your mind when these kinds of things are behind us... I have no trouble going a few days on 2-3 hours, provided the sleep is in early evening--I seem to get much drowsier through the late night hours if I lay down to sleep... Whatever you feel is important --will do. Am sorry not to get this memo to you last eve--I misunderstood Terry but really felt terrible to have misinterpreted. It was my error completely and not hers. She is a most conscientious person so her plight is upsetting to me and I feel I let her ~~down~~ down not having this at noon--and am sorry. She is easy to work with and is not unreasonable. I hope it caused you no unnecessary tension... We seem to do that unwittingly. Love,
Tish

B-1-B-96

To Dad
From Tish
RE: TAX MATTERS ~~CRITICAL~~ I feel

*Dad - is as it
brief as it
should be
made -
Please read
yourself - to
very serious
Tish*

J. 10-10a

1) In matter of Tax issues on Truth Enterprises and the Vitamin Acct.

I tried to explain to Debbie, but Gene and I both concluded she was not sufficiently grounded to comprehend what I was saying -- though I explained it 3 times.. She was not hearing me. Not against her, she is very bright --but I have had 25 years of dealing with the St Board of Equalization in Calif --and they are bastards if you don't know what to say and do...

SINCE THE INFO cannot be coded and transmitted, I feel it is in order that I do an indepth letter to Betty and June, and that we have it posted from Surinam or Trinidad -- if it means a plane fare to do it! Rhevianna needs to go to both places, and could mail some other things that would be money-making if able to go... ~~I think Trinidad would be more profitable, Insurance Co is there~~ and she could handle some claims for us too..

The clock is running out on these two ^{accounts} -- and if not properly handled, could "draw" an immediate audit -- and end up costing in the thousands because they in states would not know the danger signals of the auditor's questions... There are things you do and don't say! And if you say a "don't" then you open the gates for a flood of trouble.

2) Am not sure we are being Hassled on IRS inquiries...for this reason... (And I am first in line to be paranoid about the U. S. government...)

I recall back in the 70's at the start, they were installing computer systems to "catch" people on tax dodges... They had a program set up to hit 50% of the people by '75.. 60-70% for 1976 and 75-80% for 1977...

This was to be the procedure: The computer key operator puts in the information into the computer from the return; "Certain" computers (they at first did not have enough computers) then disallowed certain items.. In 1976, they were disallowing deductions itemized for: TAXES, INTEREST, CONTRIBUTIONS, AND CLOTHING, BOOKS & OTHER VOCATIONAL NEEDS... REQUIRING YOU BRING IN YOUR RECEIPTS TO IRS FOR ALL OF THESE.. As an alternative to bringing in the receipts, they sent a sheet computing your taxes on the standard deductions, disallowing completely your special deductions (unless you brought in proof of them)... and charging you the difference in tax.. ALL DONE BY THIS SPECIAL COMPUTER...

This program has been going on for many years that I know of -- it began back in late 60's, increasing rapidly in 70's... Was in operation when I worked for CPA office back in 68-69...

THE FORMULA FOR SOLUTION--is 1) get copy of your tax return; if you have not got it --you pay IRS for photocopy, stating you did not save one... or it got lost, or whatever. Cost is \$2-\$6...usually. 2) When I can see original return, along with IRS letter--I know where they are coming from and can advise how to handle.

In no case do I advise paying... See the person has no assets. If they have a job in states, however, government can attach wages, but must get judgment first. (easy to get). Federal judge signs order, as I recall.. If no assets they cannot collect. Must prove intent to prove fraud --so that is not easy.. If have a job, I'd say pay on a "payment" plan till they leave states and job... this prevents attachment, and reduces amt they are forced to pay...
over

B-1-B-10a

3) The matter of PT records is ~~is~~ sick...

B.1.B.106

I just found out YESTERDAY that in May of 76...Chaikin issued a letter to govt or police, stating PT records stolen...and he said a file on those needing "support of contribution" letters from P. T... HE SAID, stating that this was as we "recalled" they had contributed, but since records stolen, we could not absolutely state this was so...

UNFORTUNATELY Gene did not advise me of this, and I was the person handling the tax matters... As late as last of 76 and until Maria Katsaris left states, she was signing VERIFICATION LETTERS which Gene had approved stating our records substantiated the amounts we listed on the letters of verification...

These verification letters were set up and approved by the attorneys; I was told to issue them; they were acknowledgement of receipts of exact sums of money...

They were signed by Eva, Maria K and June Cryma Since June did not start signing them until Maria left... and I recall specifically it was Gene that told me June was the new Treasurer when I asked him AFTER Maria left "who should be signing the letters of acknowledgment of receipt for tax purposes.. I am POSITIVE these went out with his knowledge.

Yesterday, it came out that these never should have been written, because they became testimony that:

- a) Either they lied about records being stolen, or
- b) They were lying and documenting tax information which in fact could not be documented, with obvious intent to file fraudulent returns --or complicity in the crime... ~~PERJURY either way...with intent...~~

* → A CRIMINAL MATTER against the signators -- either way...

I really ~~question~~ our continuing to allow Gene to advise without my presence on tax issues... He does not know tax law. When I first took over Bookkeeping dept -- I advised on setting up a more complete system on the P. T. income and brought it up several times in government -- in each case TOS & CHAIKIN both advised me I "did not know the law" but they had thoroughly researched it! They managed very expressly to keep me OUT OF THE PT BOOKS.

~~It was their error that necessitated saying records stolen...~~
June may issue the wrong letter...with coding Debbie is sending... am very concerned on this. Again, I think a letter of instruction and an exact copy of what she should use should be mailed from another country to her. An airline ticket should be "on hand" for her use at all times...you may have to get her out of there in a hurry! She should travel under her first name and grossly misspell the last name--claiming if questioned on arrival in Guyana that airlines messed up on her ticket... *in my present opinion...*

I AM ALL THE MORE CONCERNED to get hold of Guyana Tax Law books to read for MY SELF the laws... with both of your former advisors being traitors... and Harriet not knowing tax law at all.. someone had better read up on it, and I don't know who else would comprehend what they read...not that I am all that hot, but with intense study, am sure I could figure out what I needed to know.

At first Chaikin was very superior and supercilious about the issue -- then admitted I had never been told at all about the report of stolen records! It is beyond my comprehension why I was not told... But we must begin immediate steps to correct. Thankyou... *Jish*

Tish B-1-B-106

Ed & Sarah Opinion

REPORTS
JEAN
DECEMBER 20

B-1-B-11a

1. RE. BILLS RECEIVED FROM TISH. When we sent in address change notices for people in Guyana in order to be sure family/relative mail was forwarded, we also managed to give creditors the whereabouts of members with outstanding bills. June and I have to this point gone over each and every bill pretty carefully. Medical bills as a rule we bill to Medicare/Medical or do not pay. Especially for seniors, but more and more for all people living over there. We simply don't reply to the billers. We are paying bills on Edwards, because of family situation. But I think as a rule we have gotten out of most. Those that are questionable we have sent copies of to you over there for some kind of opinion about payment or non-payment.

*OK
April*

*NO
2/19/76*

But Tish has just sent us a package full of bills that have been received through the mail forwarding process to "MISSION Village" in Georgetown. I guess that was unavoidable. But neither June nor I understand why TISH opened them all up. Wrote on them, on the faces of the bills. And gave us instructions to write as the person receiving the bills that we no longer live there and to forward further bills to "General Delivery," Detroit, for example. First of all, why does she ask us to forge the bills/letters -- when she could have gone to the various people there and had them sign such a letter??? Also, since she has opened them all up, we cannot send them back to sender, which seems a logical way out. Why not send us large packets of the bills when they accumulate, unopened, and we can peel off the "Mission Village" forwarding sticker and mail them back to the sender, from here.

Sign the bills

It has its disadvantages, because you would have to send things without checking into them to see what they are. Or ~~someone~~ someone there could carefully open them and those you wanted sent back could be put in a bundle and mailed to us here. Just a suggestion. I don't know the best way around these bills -- but I think Tish handled it pretty carelessly.

Also, we are receiving ultimatums from the State for not paying corporation taxes on Peoples Forum, on ^(Business Tax) Relics and Things, and on ~~Antix~~ Equality Action, Inc. We owe corporation taxes on all - which were never filed. \$200 each. [Approximately]. I have asked June to write up a report on all the tax (IRS) inquiries we have received from people for their 1975 tax returns. Maybe we have been careless in filing incorrect tax returns (again, that would be Tish) or maybe the T dep't is singling us out -- which is equally likely, I suppose. Please see June's report for details.

2. Kathy Purify is doing better. She has caught up on letters. We have talked several times since, and she is more willing to accept Kathy Tropps criticism and instruction. She is calling in regularly when she stays late at work and seems to be doing better all around. ~~Something is wrong~~

3. Andy is overloaded, in my opinion. It is his own fault, but he seems to take on things compulsively and doesn't know when to say stop. He has taken on additional security posts since a meeting was held about that, plus does replacements for other people. ~~DE~~ I told him to get more sleep. He keeps up with the PR events, but lately has been going on things himself. He finds it easier to go to a meeting than

B-1-B-11a

11-17-116

to control the situation... with the Race Relations and Social Concerns Committee meeting... is quite... and told... Another... the... terrible... and... should be taken off PR... whole responsibility for coordinating PR to Vera and Sam and accept the consequences

He feels best... the PR and he is... an unguided missile like that

3. Have received... on... her... summer... she was very

4. Also... latest... pray all will have an all right for now

6. RE CAROLINE... Feds... Not...

Ps - Check for you and you had enclosed a letter for... used a Sunday letter to Walter King. He has never... 2 hours in check out, we need to get out

11-18-116

Handwritten notes and signatures on the right side of the page, including a large 'X' and the name 'Dick'.