



UNIVERSITY OF MINNESOTA  
TWIN CITIES

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*Personal*

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Mr. Wesley Alonso  
4520 Dartmouth Avenue, North  
St. Petersburg, FL 33713

Dear Wesley:

Your financial statement is exactly what I needed and I am most grateful for it. I will note only a few things that we can discuss on my next visit. It seems to me your charges are far less than we had agreed on in terms of the time you put in it. I would like you to seriously consider that question and charge mother a "decent fee" for your remarkable help.

I am assuming (or rather just guessing) that the Florida UM development fund, \$10,171, is your recent reinvestment for savings in a mutual fund and that is why there is no interest report current that I could find associated with that fund. I am assuming that the New York and the C.D.'s and the Colonials were things that Dad had invested in, though I don't recall the details.

Just as a matter of note, the 6% that I calculate from the UM development fund (\$2,151 for a \$35,000 investment) appears to be low at this high time in the stock market for a mutual fund. Do you think this is something we should advise Mother about in terms of reinvestment or shall we just keep it there? I know nothing about that fund, but I assume it has a good reputation. If you know nothing specifically about it, I will inquire about it from my own financial counselor.

I appreciate the systematic and effective way you have gone about this and appreciate keeping informed. I will discuss these things in a very positive way with Mother so that she will at least during the moments that she remembers, be happy with all this. I plan to drop down for just a few hours on the last weekend in February, probably just time enough to see her, but I will give you a call. We plan to be in residence from about the 22nd of March on in Anna Maria.

I guess the only other question I have about what I am assuming to be your reinvestment in the Florida UM Development Fund is whether the fund's availability is fairly fluid and could be made available to Mother if she had unusual needs without significant penalty.

Best regards to you and Jane.

Cordially,

Henry Blackburn, M.D.  
Professor and Director

bcc: Charles Blackburn

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