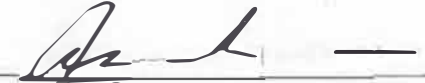



REQUEST FORM

Please complete all information on this form. Please Print.

Name (Last, First, M.I.): Keller, Annette M Birthdate: 04/11/1962
 Home Address (Street, State, Zip Code): 240 Whitmoor Terrace, Silver Spring, MD 20901
 Mailing Address (Street, State, Zip Code), if different than Home Address: 126 W Crestview Ave. Boalsburg, PA 16827
 Cell/Home Telephone: 3016612623 Work Telephone: _____ Email: amkeller@protonmail.com

- 1. I want a hearing. (If you request a hearing, complete the information on p2.) Yes No
- 2. I am sending additional written information for you to consider. Yes No
- 3. I want you to call me. An unblocked telephone number I can be reached at is _____ Yes No
- 4. I am, or have been, involved in a legal action about this finding of abuse, neglect, or exploitation. Yes No
- 5. I want a copy of the Adult Protective Services (APS) report. Yes No

Signature: 


Date: 06/24/2024

06/26/2024

- 1. A paper copy of this previously emailed form and its attachments are being sent by regular mail.
- 2. A request for evidence is also attached.
- 3. Electronic files that cannot be printed, such as audio files, are at:

https://drive.google.com/drive/folders/1KOyYk_OVbrXmsOhGtjA1TmaDGEUznliA?usp=share_link

Pursuant to A.R.S. § 41-1092.03(B), if you are requesting a hearing, you must provide:

1. A concise statement of the reasons for the appeal or request for a hearing: The findings and substantiation report #1085571 conflict with matters of record, including statements of financial accounts. I didn't make \$400,000 of transfers from my father's accounts in May 2023, or significant transfer of assets in 2023. While it's difficult to prove a negative, statements of Mr. Greco's PenFed account for April, May & June 2023 and statements of the joint account at Fidelity that was linked for transfer of assets to and from his PenFed accounts, are attached. As far as I know, my father had no other bank or investment assets at that time. I made several money transfers from his PenFed account to the joint Fidelity account per his instructions to keep no more than \$5000.00 in his PenFed account. My policy was to make no money transfers out without his authorization during the relationship. I have records of his instructions to make transfers that I did, in audio recordings and email records.

My father gifted me his investment assets in 2020 after he fell victim to a money transfer/wire scam. He thought he was helping a crime gang launder money by making transfers into and out of his PenFed account, but he was being scammed when he wired money to Eastern Europe as part of what he thought was a money laundering scheme. He had no computer or personal security to prevent himself from being hacked. For 4 years, he insisted that I own his investment assets and that he live on his pension. In the first year and a half, I avoided accepting the money and had extensive (recorded) meetings with himself, myself and lawyers to persuade him that he could secure hackers from accessing his money using trust accounts. In Nov 2021 he did execute the trust papers, but failed to cooperate in establishing trust accounts. PenFed and Fidelity would not allow me to register trust accounts without his active participation despite my power of attorney & being a co-trustee. My father never funded his trust. He instructed me to not keep money parked in the joint Fidelity account registered to his trust. He insisted that the money was mine and that he didn't want it. He refused statements, invoices and reports, as is captured in audio recordings of meetings where he is instructing me to cease all reporting. Significant transfers of money from his name to mine were executed or directed by him. Ultimately, I could not fund his trust without his consent.

2. Detailed and complete information regarding all questions of law, if applicable, that are the basis for the appeal (*attach*). The substantiation report describes my father as classified as a "vulnerable adult". I do not dispute that my father's mental status had deteriorated by June 24-26, 2023. I felt that, after my June 2023 visit, he was incapable of driving safely and a letter of incapacity should be created and he should be appointed a guardian or conservator. I sought to initiate a legal action for such, but I had insufficient evidence and his mental health status is complicated by his personality disorders.

I agree that by June 2023, Mr. Greco was appropriately classified as a "vulnerable adult" based on incapacity, but do not agree that he could be deemed to lack capacity prior to 2023.

After reviewing the substantiation report, I still lack sufficient notice of details, specifics and support for the claims in the finding to prepare a defense against it. The substantiation report with its unsupported, vague and conclusory statements lacking references to any evidence or support, does not meet standards required by the Arizona Administrative Procedure Act for clear and supported findings of fact and conclusions of law. A.R.S. § 41-1092.03 establishes the need for clear, evidence-based findings in administrative proceedings. A report with more reasonable particularity is requested.

3. All relevant supporting documentation (*you may attach to this document*).

Electronic copies of attachments may be found at

https://drive.google.com/drive/folders/1KOyYk_OVbrXmsOhGtjA1TmaDCEUznliA?usp=share_link

4. How are you adversely affected (*if applicable*)?

My father is retaliating against me because I reported him to the Pinal County Sheriff's department, Adult Protective Services and Arizona DMV for criminal and dangerous behavior. In March 2023, he pressured me to file a fraudulent claim against Geico for car damage he caused his vehicle 2 years earlier before he was covered by Geico insurance. I refused and he filed it himself. He threatened Geico when they opened a fraud investigation of his claim & they decided to close the claim, paying approx. \$8700 to him. When I arrived in Arizona in late June 2023 to pick him up for a summer vacation in the mountains, he tried to coerce me into signing his application for VA benefits containing a false claim of service-related injury. False VA benefits claims are a federal crime. I refused. He was also driving with gasoline containers in a closed car, which is very dangerous on several levels, including the neurological damage and intoxication with the fumes. I spoke with the several authorities to prevent him from doing this, and was unsuccessful. I eventually wrote the AZ DMV medical review office, which suspended his license. I contacted APS and the Sheriff in a state of distress and conflict over how to continue to serve him.

My father has a lifelong history of making false & fraudulent claims. In the past 5 years alone, he has filed multiple false accusations of abuse & financial crimes against Tucson professionals in attempts to extort services, refunds or retaliate against them. My father has launched this complaint as a retaliation against me. He has already started threatening my family with his wild and completely fabricated accusations (see attached letter to my husband). My father is threatening to disrupt my husband's employment. He harasses targets of his complaints to the point of law enforcement involvement.

His aggressive disparagement is harassment of me for refusing to put my signature on his fraudulent claims and for reporting him. His behavior has caused me emotional distress, mental anguish and has disrupted my investment and work activity, leading to losses. Finally, when I work, I sometimes need a security clearance. False accusations are damaging to me.

Report Number: 1085571

Report Date: 07/06/2023

Report Name: Keller, Annette

Equal Opportunity Employer / Program • Auxiliary aids and services are available upon request to individuals with disabilities • To request this document in alternative format or for further information about this policy, contact the Division of Aging and Adult Services at 602-542-4446; TTY/TDD Services 7-1-1 • Disponible en español en línea o en la oficina local

Exhibit A

Pentagon Federal Credit Union Statements for
April, May and June 2023



CONSOLIDATED STATEMENT

For the Period: 03/19/23 thru 04/19/23

Member Name: ANTHONY A GRECO

Member Number: [REDACTED]

ANTHONY A GRECO
36959 SOUTH LAMBERT LANE
TUCSON, AZ 85739-

Summary of Accounts

Deposit Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
[REDACTED] Account	[REDACTED]	\$49.49	\$49.49
[REDACTED] Account	[REDACTED]	\$4,658.08	\$2,252.91
[REDACTED] Account	[REDACTED]	\$86.23	\$86.24
Total Deposit Accounts		\$4,793.80	\$2,388.64

Loan Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
Thrifty Credit Service	[REDACTED]	\$0.00	\$0.00
Total Loan Accounts		\$0.00	\$0.00

Overview of Accounts

Year-to-Date Dividend on non-IRA Accounts	Year-to-Date Certificate Penalty	Year-to-Date Finance Charges	IRA Contribution 2022	IRA Contribution 2023
\$3.20	\$0.00	\$0.00	\$0.00	\$0.00

Regular Share Account

Summary for Account Number: [REDACTED]

Balance Last Statement (03/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (04/19/23)
\$49.49	\$0.00	\$0.00	\$49.49

Annual Percentage Yield Earned

.00% based on 31 days

Account Activity

Date	Description	Activity	Other Charges	Balance
03/19/23	Previous Balance			\$49.49
04/19/23	Ending Balance			\$49.49

Regular Savings Annual Percentage Yield (APY): 0.05% March and April

Access America Account

Summary for Account Number: [REDACTED]

Balance Last Statement (03/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (04/19/23)
\$4,658.08	-\$7,379.01	\$4,973.84	\$2,252.91

Annual Percentage Yield Earned

.16% based on 32 days

Account Activity

Date	Description	Activity	Other Charges	Balance
03/19/23	Previous Balance			\$4,658.08
03/20/23	Atm/debit Card Pos Debit 3379 Wal-sams Oro Valley Azwal-marus	-13.86		4,644.22
03/20/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-57.88		4,586.34
03/20/23	Preauth Debit Lago Del Oro Wat Ums Bill	-17.46		4,568.88
03/20/23	Check Card Purchase Debit 03/17 Mezzabyte 520-825-6611 Az	-20.00		4,548.88
03/21/23	Preauth Debit Southwest Gas Billpay	-247.30		4,301.58
03/21/23	Atm/debit Card Pos Debit Bashas' #052 Tucson Azbashas'us	-38.86		4,262.72
03/21/23	Check Card Purchase Debit 03/20 Saddlebrooke Util Co Httpssaddlebr Az	-37.89		4,224.83
03/21/23	Check Card Purchase Debit 03/19 Olive Garden 0021754 Oro Valley Az	-56.98		4,167.85
03/21/23	Check Card Purchase Debit 03/20 Mezzabyte 520-825-6611 Az	-168.00		3,999.85
03/22/23	Atm/debit Card Pos Debit 2150 E Tangerine Roro Valley Azwal-marus	-94.73		3,905.12
03/22/23	Check Card Purchase Debit 03/21 Orbitel Communications 520-568-8890 Az	-62.90		3,842.22
03/22/23	Check Card Purchase Debit 03/22 Mezzabyte 520-825-6611 Az	-89.00		3,753.22
03/23/23	Check Number 198	-68.50		3,684.72
03/24/23	Atm/debit Card Pos Debit 12100 N. Thormdalemarana Azfrys Fous	-50.91		3,633.81
03/24/23	Atm/debit Card Pos Debit Shell Service Stattucson Azshell Sus	-85.35		3,548.46
03/24/23	Check Card Purchase Debit 03/22 Red Lobster 6350 Oro Valley Ar	-45.53		3,502.93
03/24/23	Check Card Purchase Debit 03/23 Trico Electric Trico.smarthu Az	-76.41		3,426.52
03/24/23	Check Card Purchase Debit 03/23 Vzwrlls*apocc Visw 800-922-0204 Fl	-87.66		3,338.86
03/27/23	Atm/debit Card Pos Debit Wal-mart Super Cenoro Valley Azwm Supeus	-147.54		3,191.32
03/27/23	Check Card Purchase Debit 03/24 Saddlebrooke Homeowners Tucson Az	-30.87		3,160.45
03/27/23	Check Card Purchase Debit 03/24 Dragon Village Oro Valley Az	-57.93		3,102.52
03/28/23	Check Card Credit 03/26 Wm Supercenter #3379 Oro Valley Az	46.63		3,149.15
03/30/23	Check Card Purchase Debit 03/29 Usps Po 0388800762 Catalina Az	-33.48		3,115.67
03/30/23	Check Card Purchase Debit 03/29 Dtv*directv Service 800-347-3288 Ca	-98.52		3,017.15
03/31/23	Preauthorized Deposit Ssa Treas 310 Xxsoc Sec	156.00		3,173.15
03/31/23	Preauthorized Deposit Opm1 Treas 310 Xxciv Serv	4,770.68		7,943.83
03/31/23	Check Card Purchase Debit 03/30 Askmasterlaw*joinfee 800-556-3410 Ca	-5.00		7,938.83
04/01/23	Ach Debit By Member Umb, Na Transfer	-3,000.00		4,938.83

04/03/23	Check Card Purchase Debit 03/31 Saddlebrooke Homeowners Tucson Az	-25.28	4,913.55
04/04/23	Preauth Debit Waste Managementinternet	-70.87	4,842.68
04/04/23	Atm/debit Card Pos Debit 10595 N Oracle Rd Oro Valley Azoffice Us	-125.90	4,716.78
04/04/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-79.01	4,637.77
04/04/23	Check Card Purchase Debit 04/03 Olive Garden #00017541 Oro Valley Az	-68.09	4,569.68
04/04/23	Check Number 199	-125.00	4,444.68
04/05/23	Check Card Purchase Debit 04/05 Mezzabyte 520-825-6611 Az	-49.00	4,395.68
04/05/23	Check Card Purchase Debit 04/04 Lively Lively .com Ca	-50.37	4,345.31
04/05/23	Check Card Purchase Debit 04/04 Pp*git R Fixed Saddlebrook Az	-80.00	4,265.31
04/07/23	Check Card Purchase Debit 04/06 Usps Po 0388800762 Catalina Az	-8.13	4,257.18
04/07/23	Check Card Purchase Debit 04/06 Jerry Bobs Tucson Az	-19.27	4,237.91
04/10/23	Check Card Purchase Debit 04/07 Sbhoa2 Mountain View Cc F Tucson Az	-10.68	4,227.23
04/11/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-130.89	4,096.34
04/11/23	Check Card Purchase Debit 04/11 Ooma,inc 888-711-6662 Ca	-16.89	4,079.45
04/11/23	Check Card Purchase Debit 04/09 Olive Garden 0021754 Oro Valley Az	-38.76	4,040.69
04/12/23	Check Number 200	-115.00	3,925.69
04/13/23	Atm/debit Card Pos Debit 10571 N Oracle Rd Oro Valley Azfive Beus	-57.56	3,868.13
04/13/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-12.67	3,855.46
04/14/23	Preauth Debit Az Dept Of Rev Ccddir.dbt	-1,289.00	2,566.46
04/18/23	Preauth Debit Southwest Gas Billpay	-206.53	2,359.93
04/18/23	Atm/debit Card Pos Debit Circle K # 41649 Tucson Azcircle Us	-70.00	2,289.93
04/18/23	Check Card Purchase Debit 04/16 Red Lobster 6350 Oro Valley Ar	-37.55	2,252.38
04/19/23	Dividend	0.53	2,252.91
04/19/23	Ending Balance		\$2,252.91

Mar and Apr APY: Daily balance less than \$20,000: 0.15%;
Daily balance \$20,000 or more, up to \$50,000: 0.35%

Money Market Savings Account

Summary for Account Number: [REDACTED]

Balance Last Statement (03/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (04/19/23)
\$86.23	\$0.00	\$0.01	\$86.24

Annual Percentage Yield Earned

.13% based on 32 days

Account Activity

Date	Description	Activity	Other Charges	Balance
03/19/23	Previous Balance			\$86.23
04/19/23	Dividend	0.01		86.24
04/19/23	Ending Balance			\$86.24

Mar and Apr APY: Less than \$10,000: 0.05%; \$10,000 to \$99,999: 0.10%;
\$100,000 or more: 0.15%

Thrifty Credit Service

Summary for Account Number: [REDACTED]

Current Amount Due	Past Due Amount	Total Due by 05/11/23	Annual Percentage Rate	Balance Outstanding as of 04/19/23
\$0.00	\$0.00	\$0.00	14.65%	\$0.00

Credit Limit	Credit Available as of 04/19/23
\$5,000.00	\$5,000.00

Transactions

Date	Description	Interest Charge	Principal	Insur/Debt Protection	Other Charges	Principal Balance
03/19/23	Previous Balance					\$0.00
04/19/23	New Balance					\$0.00

Interest Charged This Period

Interest Charged on Transactions
\$0.00

2023 Totals Year-to-Date

Total Fees Charged in 2023 Total Interest Charged in 2023
\$0.00 \$0.00

>>> Your automatic payment will be made based on your instructions and availability of funds. <<<



CONSOLIDATED STATEMENT

For the Period: **04/19/23** thru **05/19/23**

Member Name: **ANTHONY A GRECO**

Member Number: **177868**

ANTHONY A GRECO
36959 SOUTH LAMBERT LANE
TUCSON, AZ 85739-

Summary of Accounts

Deposit Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
[REDACTED] Account	[REDACTED]	\$49.49	\$28.48
[REDACTED] Account	[REDACTED]	\$2,252.91	\$4,454.32
[REDACTED] Account	[REDACTED]	\$86.24	\$86.24
Total Deposit Accounts		\$2,388.64	\$4,569.04

Loan Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
Thrifty Credit Service	[REDACTED]	\$0.00	\$0.00
Total Loan Accounts		\$0.00	\$0.00

Overview of Accounts

Year-to-Date Dividend on non-IRA Accounts	Year-to-Date Certificate Penalty	Year-to-Date Finance Charges	IRA Contribution 2022	IRA Contribution 2023
\$3.73	\$0.00	\$0.00	\$0.00	\$0.00

Regular Share Account

Summary for Account Number: [REDACTED]

Balance Last Statement (04/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (05/19/23)
\$49.49	-\$8,700.00	\$8,678.99	\$28.48

Annual Percentage Yield Earned

.05% based on 30 days

Account Activity

Date	Description	Activity	Other Charges	Balance
04/19/23	Previous Balance			\$49.49
05/11/23	Mail Deposit	8,678.93		8,728.42
05/15/23	Ach Debit By Member	-5,000.00		3,728.42

05/15/23	Umb, Na Transfer Funds Transfer Debit	-2,000.00	1,728.42
05/19/23	Ach Debit By Member Umb, Na Transfer	-1,700.00	28.42
05/19/23	Dividend	0.06	28.48
05/19/23	Ending Balance		\$28.48

Regular Savings Annual Percentage Yield (APY): 0.05% April and May

Access America Account

Summary for Account Number: [REDACTED]

Balance Last Statement (04/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (05/19/23)
\$2,252.91	-\$20,234.83	\$22,436.24	\$4,454.32

Annual Percentage Yield Earned

.16% based on 30 days

Account Activity

Date	Description	Activity	Other Charges	Balance
04/19/23	Previous Balance			\$2,252.91
04/20/23	Preauth Debit Lago Del Oro Wat Ums Bill	-18.57		2,234.34
04/20/23	Check Number 193	-15,000.00		-12,765.66
04/21/23	Returned Check 193 Eff: 04/20/23	15,000.00		2,234.34
04/21/23	Fee - Non-sufficient Funds	-30.00	30.00	2,204.34
04/21/23	Preauthorized Deposit Geico Ach Refund	51.09		2,255.43
04/21/23	Check Card Purchase Debit 04/19 Olive Garden 0021754 Oro Valley Az	-36.96		2,218.47
04/21/23	Check Card Purchase Debit 04/20 Saddlebrooke Util Co Httpssaddlebr Az	-37.89		2,180.58
04/24/23	Atm/debit Card Pos Debit Safeway #1521 Oro Valley Azsafewayus	-173.67		2,006.91
04/24/23	Check Card Purchase Debit 04/23 Dragon Village Oro Valley Az	-38.88		1,968.03
04/24/23	Check Card Purchase Debit 04/23 Orbitel Communications 520-568-8890 Az	-62.90		1,905.13
04/24/23	Check Card Purchase Debit 04/21 Trico Electric Trico.smarthu Az	-78.14		1,826.99
04/24/23	Check Card Purchase Debit 04/23 Vzwrlls*apocc Visw 800-922-0204 Fl	-87.53		1,739.46
04/25/23	Check Card Purchase Debit 04/24 Jerry Bobs Tucson Az	-18.71		1,720.75
04/26/23	Check Number 186	-60.00		1,660.75
04/27/23	Domestic Wire Transfer Fee	-25.00	25.00	1,635.75
04/27/23	Domestic Wire Transfer Withdrawal	-500.00		1,135.75
04/27/23	Atm/debit Card Pos Debit 10425 N Oracle Rd Oro Valley Azoro Valus	-907.50		228.25
04/27/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-32.36		195.89
04/28/23	Preauthorized Deposit Opm1 Treas 310 Xxciv Serv	4,770.68		4,966.57
04/29/23	Atm/debit Card Pos Debit Shell Service Stattucson Azshell Sus	-57.67		4,908.90
05/01/23	Preauthorized Deposit Ssa Treas 310 Xxsoc Sec	156.00		5,064.90
05/01/23	Preauthorized Deposit Irs Treas 310 Tax Ref	458.00		5,522.90
05/01/23	Check Card Purchase Debit 04/29 Dtv*directv Service 800-34 7-3288 Ca	-98.52		5,424.38
05/02/23	Check Card Purchase Debit 04/30 Olive Garden 0021754 Oro Valley Az	-84.73		5,339.65
05/03/23	Check Number 187	-921.92		4,417.73
05/05/23	Check Card Purchase Debit 05/04 Lively Lively.com Ca	-50.37		4,367.36
05/08/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-157.65		4,209.71

05/08/23	Check Card Purchase Debit 05/05 Saddlebrooke Homeowners Tucson Az	-15.98	4,193.73
05/09/23	Check Number 189	-125.00	4,068.73
05/11/23	Check Card Purchase Debit 05/11 Ooma,inc 888-711-6662 Ca	-16.89	4,051.84
05/12/23	Check Card Purchase Debit 05/10 Mister Car Wash 325 Tucson Az	-41.00	4,010.84
05/12/23	Check Number 188	-1,008.87	3,001.97
05/15/23	Funds Transfer Credit	2,000.00	5,001.97
05/15/23	Atm/debit Card Pos Debit Petco 1175 Oro Valley Azpetco 1us	-14.11	4,987.86
05/15/23	Atm/debit Card Pos Debit Petco 1175 Oro Valley Azpetco 1us	-154.01	4,833.85
05/16/23	Atm/debit Card Pos Debit Petco 1175 Oro Valley Azpetco 1us	-115.01	4,718.84
05/16/23	Check Card Purchase Debit 05/14 Olive Garden 0021754 Oro Valley Az	-94.45	4,624.39
05/17/23	Preauth Debit Southwest Gas Billpay	-119.76	4,504.63
05/17/23	Check Card Purchase Debit 05/16 Tst* Fork & Fire Oro Valley Az	-20.40	4,484.23
05/19/23	Atm/debit Card Pos Debit 10661 Oracle Rd. Oro Valley Azfrys-fous	-30.38	4,453.85
05/19/23	Dividend	0.47	4,454.32
05/19/23	Ending Balance		\$4,454.32

Apr and May APY: Daily balance less than \$20,000: 0.15%;
Daily balance \$20,000 or more, up to \$50,000: 0.35%

Money Market Savings Account

Summary for Account Number: [REDACTED]

Balance Last Statement (04/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (05/19/23)
\$86.24	\$0.00	\$0.00	\$86.24

Annual Percentage Yield Earned

.00% based on 30 days

Account Activity

Date	Description	Activity	Other Charges	Balance
04/19/23	Previous Balance			\$86.24
05/19/23	Ending Balance			\$86.24

Apr and May APY: Less than \$10,000: 0.05%; \$10,000 to \$99,999: 0.10%;
\$100,000 or more: 0.15%

Thrifty Credit Service

Summary for Account Number: [REDACTED]

Current Amount Due	Past Due Amount	Total Due by 06/11/23	Annual Percentage Rate	Balance Outstanding as of 05/19/23
\$0.00	\$0.00	\$0.00	14.65%	\$0.00

Credit Limit Credit Available as of 05/19/23

\$5,000.00 \$5,000.00

Transactions

Date	Description	Interest Charge	Principal	Insur/Debt Protection	Other Charges	Principal Balance
04/20/23	Previous Balance					\$0.00
05/19/23	New Balance					\$0.00

Interest Charged This Period

Interest Charged on Transactions _____
\$0.00

2023 Totals Year-to-Date

Total Fees Charged in 2023 _____ Total Interest Charged in 2023 _____
\$0.00 \$0.00

>>> Your automatic payment will be made based on your instructions and availability of funds. <<<



CONSOLIDATED STATEMENT

For the Period: 05/19/23 thru 06/19/23

Member Name: **ANTHONY A GRECO**

Member Number: **177868**

ANTHONY A GRECO
36959 SOUTH LAMBERT LANE
TUCSON, AZ 85739-

Summary of Accounts

Deposit Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
Account		\$28.48	\$28.48
Account		\$4,454.32	\$1,956.26
Account		\$86.24	\$86.24
Total Deposit Accounts		\$4,569.04	\$2,070.98

Loan Accounts

Account	Account Number	Ending Balance Last Statement	Ending Balance This Statement
Thrifty Credit Service	24671060-77-0	\$0.00	\$0.00
Total Loan Accounts		\$0.00	\$0.00

Overview of Accounts

Year-to-Date Dividend on non-IRA Accounts	Year-to-Date Certificate Penalty	Year-to-Date Finance Charges	IRA Contribution 2022	IRA Contribution 2023
\$4.24	\$0.00	\$0.00	\$0.00	\$0.00

Regular Share Account

Summary for Account Number: 177868-01-5

Balance Last Statement (05/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (06/19/23)
\$28.48	\$0.00	\$0.00	\$28.48

Annual Percentage Yield Earned

.00% based on 31 days

Account Activity

Date	Description	Activity	Other Charges	Balance
05/19/23	Previous Balance			\$28.48
06/19/23	Ending Balance			\$28.48

Regular Savings Annual Percentage Yield (APY): 0.05% May and June

Access America Account

Summary for Account Number: [REDACTED]

Balance Last Statement (05/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (06/19/23)
\$4,454.32	-\$7,494.86	\$4,996.80	\$1,956.26

Annual Percentage Yield Earned

.16% based on 31 days

Account Activity

Date	Description	Activity	Other Charges	Balance
05/19/23	Previous Balance			\$4,454.32
05/22/23	Atm/debit Card Pos Debit	-56.62		4,397.70
	Shell Service Stattucson Azshell Sus			
05/22/23	Preauth Debit	-18.59		4,379.11
	Lago Del Oro Wat Ums Bill			
05/22/23	Check Card Purchase Debit 05/20	-62.90		4,316.21
	Orbitel Communications 520-568-8890 Az			
05/23/23	Check Card Purchase Debit 05/22	-37.89		4,278.32
	Saddlebrooke Util Co Httpssaddlebr Az			
05/24/23	Check Card Purchase Debit 05/22	-28.88		4,249.44
	Red Lobster 6350 Oro Valley Ar			
05/24/23	Check Card Purchase Debit 05/23	-72.15		4,177.29
	Trico Electric Trico.smarthu Az			
05/24/23	Check Card Purchase Debit 05/23	-87.53		4,089.76
	Vzwrllss*apocc Visw 800-922-0204 Fl			
05/24/23	Check Card Purchase Debit 05/22	-95.79		3,993.97
	The Home Depot 481 Oro Valley Az			
05/26/23	Check Card Purchase Debit 05/25	-120.67		3,873.30
	Fp *mypillow Inc 800-3081299 Mn			
05/27/23	Atm/debit Card Pos Debit	-110.23		3,763.07
	Bashas' #052 Tucson Azbashas'us			
05/29/23	Check Card Purchase Debit 05/26	-109.57		3,653.50
	The Home Depot #0481 Oro Valley Az			
05/29/23	Check Card Purchase Debit 05/26	-160.89		3,492.61
	Inmotionhosting.com 888-3214678 Ca			
05/30/23	Preauthorized Deposit	4,770.68		8,263.29
	Opn1 Treas 310 Xxciv Serv			
05/30/23	Ach Debit By Member	-3,000.00		5,263.29
	Umb, Na Transfer			
05/30/23	Check Card Purchase Debit 05/29	-98.52		5,164.77
	Dtv*directv Service 800-347-3288 Ca			
05/31/23	Preauthorized Deposit	156.00		5,320.77
	Ssa Treas 310 Xxsoc Sec			
06/02/23	Atm/debit Card Pos Debit	-316.70		5,004.07
	The Home Depot #04oro Valley Azthe Homus			
06/02/23	Atm/debit Card Pos Debit	-60.29		4,943.78
	10805 N Oracle Rd Oro Valley Azdollar Us			
06/02/23	Atm/debit Card Pos Debit	-47.30		4,896.48
	10661 Oracle Rd. Oro Valley Azfrys-fous			
06/02/23	Check Card Purchase Debit 05/31	-51.11		4,845.37
	Saddlebrooke Homeowners Tucson Az			
06/05/23	Atm/debit Card Pos Debit	-187.93		4,657.44
	12100 N. Thorndalemarana Azfrys Fous			
06/05/23	Atm/debit Card Pos Credit	22.95		4,680.39
	Frys Food Drg #6 1marana Azfrys Fous			
06/05/23	Check Number 190	-300.00		4,380.39
06/06/23	Check Card Purchase Debit 06/05	-18.22		4,362.17
	Subway 1842 Tucson Az			
06/06/23	Check Card Purchase Debit 06/04	-21.20		4,340.97
	Sbhoa2 Mountain View Cc F Tucson Az			
06/06/23	Check Card Purchase Debit 06/05	-50.37		4,290.60
	Lively Lively.com Ca			
06/06/23	Check Card Purchase Debit 06/06	-89.00		4,201.60
	Mezzabyte 520-825-6611 Az			
06/07/23	Check Card Purchase Debit 06/06	-20.00		4,181.60
	Jerry Bobs Tucson Az			

06/07/23	Check Card Purchase Debit 06/06 Fp *mypillow Inc 800-3081299 Mn	-67.31	4,114.29
06/12/23	Atm/debit Card Pos Debit Bashas' #052 Tucson Azbashes'us	-46.66	4,067.63
06/12/23	Atm/debit Card Pos Debit O'reilly Auto Partcatalina Azo'reillus	-46.66	4,020.97
06/12/23	Check Card Purchase Debit 06/11 Ooma,inc 888-711-6662 Ca	-16.89	4,004.08
06/12/23	Check Card Purchase Debit 06/09 Sbhoa2 Mountain View Cc F Tucson AZ	-26.53	3,977.55
06/12/23	Check Number 192	-120.00	3,857.55
06/12/23	Check Number 191	-1,340.00	2,517.55
06/14/23	Atm/debit Card Pos Debit In *tucson Auto TitucsonAzin *tucus	-228.27	2,289.28
06/15/23	Preauth Debit Southwest Gas Billpay	-26.83	2,262.45
06/15/23	Check Card Purchase Debit 06/15 Chevron 0382428 Tucson Az	-50.95	2,211.50
06/16/23	Check Card Purchase Debit 06/14 Red Lobster 6350 Oro Valley Ar	-50.93	2,160.57
06/19/23	Atm/debit Card Pos Credit O'reilly Auto Partcatalina Azo'reillus	46.66	2,207.23
06/19/23	Atm/debit Card Pos Debit O'reilly Auto Partcatalina Azo'reillus	-37.11	2,170.12
06/19/23	Atm/debit Card Pos Debit 3379 Wal-sams Oro Valley Azwal-marus	-214.37	1,955.75
06/19/23	Dividend	0.51	1,956.26
06/19/23	Ending Balance		\$1,956.26

May and Jun APY: Daily balance less than \$20,000: 0.15%;
Daily balance \$20,000 or more, up to \$50,000: 0.35%

Money Market Savings Account

Summary for Account Number: [REDACTED]

Balance Last Statement (05/19/23)	Total Debits This Period	Total Credits This Period	Ending Balance (06/19/23)
\$86.24	\$0.00	\$0.00	\$86.24

Annual Percentage Yield Earned

.00% based on 31 days

Account Activity

Date	Description	Activity	Other Charges	Balance
05/19/23	Previous Balance			\$86.24
06/19/23	Ending Balance			\$86.24

May and Jun APY: Less than \$10,000: 0.05%; \$10,000 to \$99,999: 0.10%;
\$100,000 or more: 0.15%

Thrifty Credit Service

Summary for Account Number: [REDACTED]

Current Amount Due	Past Due Amount	Total Due by 07/11/23	Annual Percentage Rate	Balance Outstanding as of 06/19/23
\$0.00	\$0.00	\$0.00	14.65%	\$0.00

Credit Limit

Credit Available as of 06/19/23

\$5,000.00	\$5,000.00
------------	------------

Transactions

Date	Description	Interest Charge	Principal	Insur/Debt Protection	Other Charges	Principal Balance
05/20/23	Previous Balance					\$0.00
06/19/23	New Balance					\$0.00

Interest Charged This Period

Interest Charged on Transactions
<u>\$0.00</u>

2023 Totals Year-to-Date

Total Fees Charged in 2023	Total Interest Charged in 2023
<u>\$0.00</u>	<u>\$0.00</u>

>>> Your automatic payment will be made based on your instructions and availability of funds. <<<

Exhibit B

Fidelity Account x2579 Statement for April, May and
June 2023



FIDELITY ACCOUNT ANTHONY A GRECO AND ANNETTE M KELLER -
WITH RIGHTS OF SURVIVORSHIP

▶ Account Number: [REDACTED] 2579

Envelope # BNTPTKBBBKWRZ

ANTHONY ANGELO GRECO
ANNETTE M KELLER
36959 S LAMBERT LN
TUCSON AZ 85739-1217

Your Account Value: \$38.33

Change from Last Period: ▲ \$1.12

	This Period	Year-to-Date
Beginning Account Value	\$37.21	\$136.10
Additions	3,000.00	8,000.00
Subtractions	-3,000.00	-8,100.00
Change in Investment Value *	1.12	2.23
Ending Account Value **	\$38.33	\$38.33
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$38.33	

Contact Information

Online	Fidelity.com
FAST®-Automated Telephone	(800) 544-5555
Customer Service	(800) 544-6666

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

** Excludes unpriced securities.





Account Summary

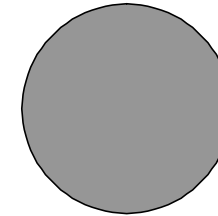
Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Account Value: **\$38.33**

Account Holdings

Change in Account Value **▲ \$1.12**

	This Period	Year-to-Date
Beginning Account Value	\$37.21	\$136.10
Additions	3,000.00	8,000.00
Deposits	3,000.00	8,000.00
Subtractions	-3,000.00	-8,100.00
Withdrawals	-1,000.00	-1,000.00
Exchanges Out	-	-5,100.00
Cards, Checking & Bill Payments	-2,000.00	-2,000.00
Change in Investment Value *	1.12	2.23
Ending Account Value	\$38.33	\$38.33
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$38.33	



100% Core Account (\$38)

Top Holdings

Description	Value	Percent of Account
Fidelity Government Money Market	\$38	100%
Total	\$38	100%

Please note that, due to rounding, percentages may not add to 100%.

Income Summary

	This Period	Year-to-Date
Taxable	\$1.12	\$2.23
Dividends	1.12	2.23
Total	\$1.12	\$2.23

Total Account Trades May 2022 - Apr 2023: 0

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.



Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Core Account and Credit Balance Cash Flow

	This Period	Year-to-Date
Beginning Balance	\$37.21	\$136.10
Investment Activity		
Dividends, Interest & Other Income ^D	1.12	2.23
Exchanges Out	-	-5,100.00
Total Investment Activity	\$1.12	-\$5,097.77
Cash Management Activity		
Deposits	3,000.00	8,000.00
Withdrawals	-1,000.00	-1,000.00
Debit Card Activity	-2,000.00	-2,000.00
Total Cash Management Activity	-	\$5,000.00
Ending Balance	\$38.33	\$38.33

^D Includes dividend reinvestments.

Holdings

Core Account

Description	Beginning Market Value Apr 1, 2023	Quantity Apr 30, 2023	Price Per Unit Apr 30, 2023	Ending Market Value Apr 30, 2023	EAI (\$) / EY (%)
FIDELITY GOVERNMENT MONEY MARKET (SPAXX)	\$37.21	38.330	\$1.0000	\$38.33	\$0.89 / 2.320%
-- 7-day yield: 4.5%					
Total Core Account (100% of account holdings)	\$37.21			\$38.33	\$0.89
Total Holdings				\$38.33	\$0.89

EAI **Estimated Annual Income (EAI) & Estimated Yield (EY)**- EAI is an estimate of annual income for a specific security position over the next rolling 12 months. EAI may be negative on short & EY positions. EY is calculated by dividing the current EAI for a security position by its statement closing date market value. EAI and EY are estimates only and may include return of principal and/or capital gains, which would render them overstated. Actual income and yield might be lower or higher than the estimated amounts. **For calculation details, refer to the "Additional Information and Endnotes" section.**

MR_CE_BNTPTKBBKWRZ_BB BBB 20230428 S



Activity

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Dividends, Interest & Other Income

(Includes dividend reinvestment)

Settlement Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
04/28	FIDELITY GOVERNMENT MONEY MARKET	31617H102	Dividend Received	-	-	\$1.12
Total Dividends, Interest & Other Income						\$1.12

Deposits

Date	Reference	Description	Amount
04/04	000008177018028	Deposit Pentagon Fed	\$3,000.00
Total Deposits			\$3,000.00

Withdrawals

Date	Reference	Description	Amount
04/05	Money Line Paid	EFT FUNDS PAID ED94769024 /WEB USAA FEDERAL SAVINGS BANK *****6174	-\$1,000.00
Total Withdrawals			-\$1,000.00

Core Fund Activity

For more information about the operation of your core account, please refer to your Customer Agreement.

Settlement Date	Account Type	Transaction	Description	Quantity	Price	Amount	Balance
04/04	CASH	You Bought	FIDELITY GOVERNMENT MONEY MARKET MORNING TRADE @ 1	3,000.000	\$1.0000	\$3,000.00	\$3,037.21
04/05	CASH	You Sold	FIDELITY GOVERNMENT MONEY MARKET @ 1	-1,000.000	1.0000	-1,000.00	2,037.21
04/06	CASH	You Sold	FIDELITY GOVERNMENT MONEY MARKET @ 1	-2,000.000	1.0000	-2,000.00	37.21
04/28	CASH	Reinvestment	FIDELITY GOVERNMENT MONEY MARKET REINVEST @ \$1.000	1.120	1.0000	1.12	38.33
Total Core Fund Activity						\$1.12	

MR_CE_BNTPTKBBKWRZ_BB BBBB 20230428 S



Activity

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Debit Card Summary

Beginning Balance	\$0.00
Total Purchases	-2,000.00
Total Payments	-2,000.00
Ending Balance	\$0.00

Debit Card Activity

Fidelity® Debit Card (ACCOUNT...2891)

TRANSACTIONS

Trans. Date	Post Date	Location Reference/Description	Amount
Purchases			
04/04	04/06	CASITA TRAVEL TRAILERS 903-326-4717 TX 24388982Y0T561JBK	-\$2,000.00
Total Purchases			-\$2,000.00
Fidelity® Debit Card (...2891) Subtotal			-\$2,000.00
Total Debit Card Activity			-\$2,000.00

Additional Information and Endnotes

The following interested party information is on file for your account:

ANNETTE M KELLER
240 WHITMOOR TER
SILVER SPRING MD 20901-1521

▶ Please go to fidelity.com/disclosures to review important legal and regulatory disclosures. 1080017.1.0

Estimated Annual Income (EAI) & Estimated Yield (EY) - EAI for fixed income is calculated using the coupon rate. For all other securities, EAI is calculated using an indicated annual dividend (IAD). The IAD is an estimate of a security's dividend payments for the next 12 months calculated based on prior and/or declared dividends for that security. EY reflects only the income generated by an investment and not changes in its price which may fluctuate. Interest and dividend rates are subject to change at any time and may be affected by current and future economic, political and business conditions. EAI and EY are provided for informational purposes only and should not be used or relied on for making investment, trading or tax decisions. EAI and EY are based on data obtained from information providers believed to be reliable, but no assurance can be made as to accuracy, timeliness or completeness. **Please refer to the Help/Glossary on Fidelity.com for additional information regarding these calculations.**



Additional Information and Endnotes

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Copyright 2022, S&P Global Market Intelligence. Reproduction of any information, data or material, including ratings ("Content") in any form is prohibited except with the prior written permission of the relevant party. Such party, its affiliates and suppliers ("Content Providers") do not guarantee the accuracy, adequacy, completeness, timeliness or availability of any Content and are not responsible for any errors or omissions (negligent or otherwise), regardless of the cause, or for the results obtained from the use of such Content. In no event shall Content Providers be liable for any damages, costs, expenses, legal fees, or losses (including lost income or lost profit and opportunity costs) in connection with any use of the Content. A reference to a particular investment or security, a rating or any observation concerning an investment that is part of the Content is not a recommendation to buy, sell or hold such investment or security, does not address the suitability of an investment or security and should not be relied on as investment advice. Credit ratings are statements of opinions and are not statements of fact.

Moody's© Copyright 2022, Moody's Investors Service, Inc. ("Moody's"). Moody's ratings ("Ratings") are proprietary to Moody's or its affiliates and are protected by copyright and other intellectual property laws. Ratings are licensed to Licensee by Moody's. RATINGS MAY NOT BE COPIED OR OTHERWISE REPRODUCED, REPACKAGED, FURTHER TRANSMITTED, TRANSFERRED, DISSEMINATED, REDISTRIBUTED OR RESOLD, OR STORED FOR SUBSEQUENT USE FOR ANY SUCH PURPOSE, IN WHOLE OR IN PART, IN ANY FORM OR MANNER OR BY ANY MEANS WHATSOEVER, BY ANY PERSON WITHOUT MOODY'S PRIOR WRITTEN CONSENT. Moody's® is a registered trademark.

For more information about your statement, please refer to our **Frequently Asked Questions** document at [Fidelity.com/statements](https://www.fidelity.com/statements).



Information About Your Fidelity Statement

Lost or Stolen Cards For 24-Hour worldwide customer service, call 800-529-2164 for American Express or 800-323-5353 for Fidelity® Debit Card.

Additional Investments with Fidelity Make checks payable to Fidelity Investments. Include your account number on the check. For retirement and health savings accounts (HSA), designate in the memo field whether your contribution is for the current or prior year. Mail checks or other inquiries to: Fidelity Investments, P.O. Box 770001, Cincinnati, OH 45277-0003.

Income Summary Shows income by tax status for the statement and year-to-date periods. Except for interest income earned on, or distributed by, tax-exempt securities, Fidelity reports dividends and capital gains held in taxable accounts as taxable income. A portion of income reported as tax-exempt income may be subject to alternative minimum taxes and/or state and local taxes. In Traditional IRAs, Rollover IRAs, SEP-IRAs, SIMPLE IRAs and Keoghs, earnings are reported as tax-deferred income. In Roth IRAs and HSAs, earnings are reported as tax-exempt income as they may be federally tax-exempt if certain conditions are met.

Cost Basis, Gain/Loss, and Holding Period Information NFS is required to report certain cost basis and holding period information to the IRS on Form 1099-B. Unless otherwise specified, NFS applies the average cost method for open-end mutual funds and the first-in, first-out (FIFO) method for all other securities. Cost basis is adjusted for wash sales on securities with the same CUSIP held in the same account (unless your account receives mark-to-market reporting). Your statement may not reflect all adjustments required for tax purposes. Customers should consult their tax advisors for further information.

Cost Fidelity provides purchase cost information for securities held in retirement and HSA accounts. Such information may be adjusted for certain transactions and does not reflect dividends or capital gains reinvestments. Fidelity reports transaction profit or loss information when securities are sold within a retirement or HSA account. Transaction profit or loss is calculated by subtracting purchase cost from sales proceeds

Additional Information About Your Brokerage Account, If Applicable

Free credit balances (FCB) are funds payable to you on demand. FCB are subject to open commitments such as uncleared checks and exclude proceeds from sales of certificated securities without delivery of the certificate. If your FCB is swept to a core position, you can liquidate the core position and have the proceeds sent to you or held in your account subject to the terms of your account agreement. Required rule 10b-10(a) information not contained herein will be provided on written request. Fidelity may use this free credit balance in connection with its business, subject to applicable law. **Assets Separate from Your Brokerage Account** Only securities in the margin portion of your brokerage account contribute to margin and maintenance requirements. Other Assets, which may be reported on your statement, including insurance products that are distributed by FBS and Fidelity Insurance Agency, Inc. and mutual fund only accounts held directly with the fund (Fidelity Mutual Fund Accounts) are not carried by NFS, not covered by the Securities Investor Protection Corporation (SIPC) and do not count toward your margin and maintenance requirements. Assets held in brokerage accounts managed by Fidelity Personal and Workplace Advisors LLC (FPWA) are carried by NFS and covered by SIPC but do not contribute to your margin and maintenance requirements. **Short Account Balances** Securities sold short are held in a segregated short account. These securities are marked-to-market for margin purposes, and any increase or decrease from the previous week's value is transferred weekly to your margin account. Fidelity represents your short account balance as of the last weekly mark-to-market, not as of the statement end date. **Information About Your Option Transactions** Each transaction confirmation previously delivered to you contains full information about commissions and other charges, and such information is available promptly upon request. Assignments of American and European-style options are allocated among customer short positions pursuant to a random allocation procedure, a description is available upon request. Short positions in American-style options are liable for assignment anytime. The writer of a European-style option is subject to exercise assignment only during the exercise period. For more information, please call Fidelity at 800-544-6666. **Equity Dividend Reinvestment** Shares credited to your account resulted from transactions by FBS acting as agent for your account, or the Depository Trust Company (DTC). **Price Information/Total Market Value** The Total Market Value has been calculated out to 9 decimal places but the individual unit price is displayed in 5 decimal places. The Total Market Value represents prices obtained from various sources, may be impacted by the frequency with which such prices are reported and such prices are not guaranteed. Prices received from pricing vendors are generally based on current market quotes, but when such quotes are not available the pricing vendors use a variety of techniques to estimate value. These estimates, particularly for fixed income securities, may be based on certain minimum principal amounts (e.g. \$1 million) and may not reflect all of the factors that affect the value of the security, including liquidity risk. In certain situations, a price may be derived from a single market participant, also known as a "single broker quote". The prices provided are not firm bids or offers. Certain securities may reflect as N/A or unavailable where the price for such security is generally not available from a pricing source. The Market Value of a security, including those priced at par value, may differ from its purchase price and may not closely reflect the

using the FIFO method if shares were purchased at different times or prices. **Statement Mailing** We deliver statements at least four times during the calendar year for any account with a balance.

Statement Discrepancies Please review your statement and report any inaccuracies or discrepancies. Inquiries, concerns or questions regarding your brokerage account or the activity therein should be directed to FBS by calling 800-544-6666, and NFS, who carries your brokerage accounts, by calling 866-408-1138. Any oral communications regarding inaccuracies or discrepancies should be reconfirmed in writing to protect your rights, including those under the Securities Investor Protection Act (SIPA).

Material Changes Please advise us of material changes in your investment objectives or financial situation related to your brokerage account(s).

Mutual Funds and Performance Before investing, consider the funds' investment objectives, risks, charges and expenses. Contact Fidelity for a prospectus containing this information. Read it carefully. Performance data shown represents past performance and is no guarantee of future results. Investment return and principal value will fluctuate, so you may have a gain or loss when shares are sold. Current performance may be higher or lower than that quoted. Visit Fidelity.com/performance for most recent month-end performance.

Sales Loads & Fees Each fund reserves the right to terminate or modify its exchange privilege in the future. In connection with (i) access to, purchase, sale, exchange or redemption of, and/or maintenance of positions in mutual funds, ETFs and other investment products ("funds") or (ii) infrastructure needed to support such funds, some funds, or their investment affiliates, pay FBS and/or NFS sales loads and 12b-1 fees described in the prospectus as well as additional compensation for shareholder services, start-up fees, platform support and maintenance, and marketing, engagement and analytics programs. Additional information about the source(s) and amount(s) of compensation as well as other remuneration received by FBS or NFS will be furnished to you upon written request. At the time you purchase shares of funds those shares will be assigned either a load, transaction fee (TF) or no transaction fee (NTF) status. When you subsequently sell those shares, any fees applicable to your transaction will be assessed based on the status assigned to the shares at the time of purchase.

value at which the security may be sold or purchased based on various market factors. The sale or redemption of any fixed income security prior to maturity may result in a loss. Prices for Certificates of Deposits (CDs) on your statement are generally estimates and are not based on actual market prices. The secondary market for CDs is generally illiquid. You should always request a current valuation for your securities prior to making a financial decision or placing an order.

Executing Orders on the Floor of the NYSE The Floor broker may permit the Designated Market Maker to trade on parity with the order for some or all of the executions associated with filling that order, where such permission would not be inconsistent with the broker's best execution obligations.

SIPC Securities in accounts carried by NFS, a Fidelity Investments company, are protected in accordance with the SIPC up to \$500,000 (including cash claims limited to \$250,000). For details, including the SIPC brochure, please see www.sipc.org or call 1-202-371-8300. NFS has arranged for additional protection for cash and covered securities to supplement its SIPC coverage. Neither coverage protects against a decline in the market value of securities.

Fidelity Investments Fidelity Distributors Company LLC (FDC) is the distributor for Fidelity Funds with marketing and shareholder services provided by FBS or NFS. **Brokerage services are provided by FBS, which clears all transactions through its affiliate, NFS. NFS carries all brokerage accounts. FBS and NFS are members of the NYSE and SIPC.** Upon written request, Fidelity will mail an NFS financial statement, which is also available for inspection at its office. Fidelity Investments (with pyramid logo) is a trademark of FMR LLC.

FPWA Services Fidelity Go®, Fidelity Managed FidFoliosSM and Fidelity® Strategic Disciplines are advisory services offered by FPWA, a registered investment adviser. Fidelity® Strategic Disciplines includes the Breckinridge Intermediate Municipal Strategy, the Fidelity® Equity-Income Strategy, the Fidelity® Tax-Managed U.S. Equity Index Strategy, the Fidelity® U.S. Large Cap Equity Strategy, the Fidelity® International Equity Strategy, the Fidelity® Tax-Managed International Equity Index Strategy, the Fidelity® Intermediate Municipal Strategy and the Fidelity® Core Bond Strategy. Fidelity® Wealth Services are advisory services offered by FPWA or Fidelity Personal Trust Company, FSB (FPTC), a federal savings bank. Nondeposit investment products and trust services offered by FPTC and its affiliates are not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency, are not obligations of any bank, and are subject to risk, including possible loss of principal. **These advisory services are provided for a fee.** FBS, NFS, FDC, FPWA and FPTC are direct or indirect subsidiaries of FMR LLC.

Miscellaneous Mutual fund shares, other securities held in your account, and insurance products are neither deposits nor obligations of, nor endorsed or guaranteed by, any bank or other depositing institution, nor are they federally insured by the FDIC or any other agency. If you request a reprint of your statement, the disclosure information may not be the same as the information originally provided. To confirm that an authorized, direct deposit has been made to your Fidelity Account or Fidelity Mutual Fund Account, call Fidelity at 1-800-544-5555.

588130.55.0

MR_CE_BNTPTKBBKWRZ_BB888 20230428



This page intentionally left blank



Envelope # BNWXQZBBBLHVR

ANTHONY ANGELO GRECO
ANNETTE M KELLER
36959 S LAMBERT LN
TUCSON AZ 85739-1217

FIDELITY ACCOUNT ANTHONY A GRECO AND ANNETTE M KELLER -
WITH RIGHTS OF SURVIVORSHIP

► Account Number: [REDACTED] 2579

Your Account Value: \$40.00

Change from Last Period: ▲ \$1.67

	This Period	Year-to-Date
Beginning Account Value	\$38.33	\$136.10
Additions	6,700.00	14,700.00
Subtractions	-6,700.00	-14,800.00
Change in Investment Value *	1.67	3.90
Ending Account Value **	\$40.00	\$40.00
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$40.00	

Contact Information

Online	Fidelity.com
FAST®-Automated Telephone	(800) 544-5555
Customer Service	(800) 544-6666

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

** Excludes unpriced securities.





Account Summary

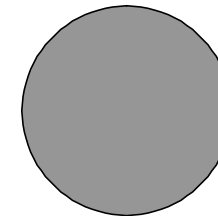
Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Account Value: **\$40.00**

Account Holdings

Change in Account Value **▲ \$1.67**

	This Period	Year-to-Date
Beginning Account Value	\$38.33	\$136.10
Additions	6,700.00	14,700.00
Deposits	6,700.00	14,700.00
Subtractions	-6,700.00	-14,800.00
Withdrawals	-	-1,000.00
Exchanges Out	-6,700.00	-11,800.00
Cards, Checking & Bill Payments	-	-2,000.00
Change in Investment Value *	1.67	3.90
Ending Account Value	\$40.00	\$40.00
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$40.00	



100% Core Account (\$40)

Top Holdings

Description	Value	Percent of Account
Fidelity Government Money Market	\$40	100%
Total	\$40	100%

Please note that, due to rounding, percentages may not add to 100%.

Income Summary

	This Period	Year-to-Date
Taxable	\$1.67	\$3.90
Dividends	1.67	3.90
Total	\$1.67	\$3.90

Total Account Trades Jun 2022 - May 2023: 0

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.



Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Core Account and Credit Balance Cash Flow

	This Period	Year-to-Date
Beginning Balance	\$38.33	\$136.10
Investment Activity		
Dividends, Interest & Other Income ^D	1.67	3.90
Exchanges Out	-6,700.00	-11,800.00
Total Investment Activity	-\$6,698.33	-\$11,796.10
Cash Management Activity		
Deposits	6,700.00	14,700.00
Withdrawals	-	-1,000.00
Debit Card Activity	-	-2,000.00
Total Cash Management Activity	\$6,700.00	\$11,700.00
Ending Balance	\$40.00	\$40.00

^D Includes dividend reinvestments.

Holdings

Core Account

Description	Beginning Market Value May 1, 2023	Quantity May 31, 2023	Price Per Unit May 31, 2023	Ending Market Value May 31, 2023	EAI (\$) / EY (%)
FIDELITY GOVERNMENT MONEY MARKET (SPAXX)	\$38.33	40.000	\$1.0000	\$40.00	\$1.07 / 2.680%
-- 7-day yield: 4.75%					
Total Core Account (100% of account holdings)	\$38.33			\$40.00	\$1.07
Total Holdings				\$40.00	\$1.07

EAI **Estimated Annual Income (EAI) & Estimated Yield (EY)**- EAI is an estimate of annual income for a specific security position over the next rolling 12 months. EAI may be negative on short & EY positions. EY is calculated by dividing the current EAI for a security position by its statement closing date market value. EAI and EY are estimates only and may include return of principal and/or capital gains, which would render them overstated. Actual income and yield might be lower or higher than the estimated amounts. **For calculation details, refer to the "Additional Information and Endnotes" section.**

MR_CE_BNWXQZBBLLHVR_BB BBB 20230531 S



Activity

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Dividends, Interest & Other Income

(Includes dividend reinvestment)

Settlement Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
05/31	FIDELITY GOVERNMENT MONEY MARKET	31617H102	Dividend Received	-	-	\$1.67
Total Dividends, Interest & Other Income						\$1.67

Deposits

Date	Reference	Description	Amount
05/17	000000177868015	Deposit Pentagon Fed	\$5,000.00
05/23	000000177868015	Deposit Pentagon Fed	1,700.00
Total Deposits			\$6,700.00

Exchanges Out

Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
05/18	Z20-297963-1		Transferred To	-	-	-\$5,000.00
05/23	Z20-297963-1		Transferred To	-	-	-1,700.00
Total Exchanges Out						-\$6,700.00

Core Fund Activity

For more information about the operation of your core account, please refer to your Customer Agreement.

Settlement Date	Account Type	Transaction	Description	Quantity	Price	Amount	Balance
05/17	CASH	You Bought	FIDELITY GOVERNMENT MONEY MARKET MORNING TRADE @ 1	5,000.000	\$1.0000	\$5,000.00	\$5,038.33
05/18	CASH	You Sold	FIDELITY GOVERNMENT MONEY MARKET @ 1	-5,000.000	1.0000	-5,000.00	38.33
05/23	CASH	You Sold	FIDELITY GOVERNMENT MONEY MARKET @ 1	-1,700.000	1.0000	-1,700.00	-1,661.67
05/23	CASH	You Bought	FIDELITY GOVERNMENT MONEY MARKET MORNING TRADE @ 1	1,700.000	1.0000	1,700.00	38.33



Activity

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Core Fund Activity (continued)

For more information about the operation of your core account, please refer to your Customer Agreement.

Settlement Date	Account Type	Transaction	Description	Quantity	Price	Amount	Balance
05/31	CASH	Reinvestment	FIDELITY GOVERNMENT MONEY MARKET REINVEST @ \$1.000	1.670	1.0000	1.67	40.00
Total Core Fund Activity						\$1.67	

Additional Information and Endnotes

The following interested party information is on file for your account:

ANNETTE M KELLER
240 WHITMOOR TER
SILVER SPRING MD 20901-1521

► Please go to fidelity.com/disclosures to review important legal and regulatory disclosures. 1080017.1.0

Estimated Annual Income (EAI) & Estimated Yield (EY) - EAI for fixed income is calculated using the coupon rate. For all other securities, EAI is calculated using an indicated annual dividend (IAD). The IAD is an estimate of a security's dividend payments for the next 12 months calculated based on prior and/or declared dividends for that security. EY reflects only the income generated by an investment and not changes in its price which may fluctuate. Interest and dividend rates are subject to change at any time and may be affected by current and future economic, political and business conditions. EAI and EY are provided for informational purposes only and should not be used or relied on for making investment, trading or tax decisions. EAI and EY are based on data obtained from information providers believed to be reliable, but no assurance can be made as to accuracy, timeliness or completeness. **Please refer to the Help/Glossary on Fidelity.com for additional information regarding these calculations.**

Copyright 2022, S&P Global Market Intelligence. Reproduction of any information, data or material, including ratings ("Content") in any form is prohibited except with the prior written permission of the relevant party. Such party, its affiliates and suppliers ("Content Providers") do not guarantee the accuracy, adequacy, completeness, timeliness or availability of any Content and are not responsible for any errors or omissions (negligent or otherwise), regardless of the cause, or for the results obtained from the use of such Content. In no event shall Content Providers be liable for any damages, costs, expenses, legal fees, or losses (including lost income or lost profit and opportunity costs) in connection with any use of the Content. A reference to a particular investment or security, a rating or any observation concerning an investment that is part of the Content is not a recommendation to buy, sell or hold such investment or security, does not address the suitability of an investment or security and should not be relied on as investment advice. Credit ratings are statements of opinions and are not statements of fact.



Additional Information and Endnotes

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Moody's® Copyright 2022, Moody's Investors Service, Inc. ("Moody's"). Moody's ratings ("Ratings") are proprietary to Moody's or its affiliates and are protected by copyright and other intellectual property laws. Ratings are licensed to Licensee by Moody's. RATINGS MAY NOT BE COPIED OR OTHERWISE REPRODUCED, REPACKAGED, FURTHER TRANSMITTED, TRANSFERRED, DISSEMINATED, REDISTRIBUTED OR RESOLD, OR STORED FOR SUBSEQUENT USE FOR ANY SUCH PURPOSE, IN WHOLE OR IN PART, IN ANY FORM OR MANNER OR BY ANY MEANS WHATSOEVER, BY ANY PERSON WITHOUT MOODY'S PRIOR WRITTEN CONSENT. Moody's® is a registered trademark.

For more information about your statement, please refer to our **Frequently Asked Questions** document at **Fidelity.com/statements** .



Information About Your Fidelity Statement

Lost or Stolen Cards For 24-Hour worldwide customer service, call 800-529-2164 for American Express or 800-323-5353 for Fidelity® Debit Card.

Additional Investments with Fidelity Make checks payable to Fidelity Investments. Include your account number on the check. For retirement and health savings accounts (HSA), designate in the memo field whether your contribution is for the current or prior year. Mail checks or other inquiries to: Fidelity Investments, P.O. Box 770001, Cincinnati, OH 45277-0003.

Income Summary Shows income by tax status for the statement and year-to-date periods. Except for interest income earned on, or distributed by, tax-exempt securities, Fidelity reports dividends and capital gains held in taxable accounts as taxable income. A portion of income reported as tax-exempt income may be subject to alternative minimum taxes and/or state and local taxes. In Traditional IRAs, Rollover IRAs, SEP-IRAs, SIMPLE IRAs and Keoghs, earnings are reported as tax-deferred income. In Roth IRAs and HSAs, earnings are reported as tax-exempt income as they may be federally tax-exempt if certain conditions are met.

Cost Basis, Gain/Loss, and Holding Period Information NFS is required to report certain cost basis and holding period information to the IRS on Form 1099-B. Unless otherwise specified, NFS applies the average cost method for open-end mutual funds and the first-in, first-out (FIFO) method for all other securities. Cost basis is adjusted for wash sales on securities with the same CUSIP held in the same account (unless your account receives mark-to-market reporting). Your statement may not reflect all adjustments required for tax purposes. Customers should consult their tax advisors for further information.

Cost Fidelity provides purchase cost information for securities held in retirement and HSA accounts. Such information may be adjusted for certain transactions and does not reflect dividends or capital gains reinvestments. Fidelity reports transaction profit or loss information when securities are sold within a retirement or HSA account. Transaction profit or loss is calculated by subtracting purchase cost from sales proceeds

Additional Information About Your Brokerage Account, If Applicable

Free credit balances (FCB) are funds payable to you on demand. FCB are subject to open commitments such as uncleared checks and exclude proceeds from sales of certificated securities without delivery of the certificate. If your FCB is swept to a core position, you can liquidate the core position and have the proceeds sent to you or held in your account subject to the terms of your account agreement. Required rule 10b-10(a) information not contained herein will be provided on written request. Fidelity may use this free credit balance in connection with its business, subject to applicable law. **Assets Separate from Your Brokerage Account** Only securities in the margin portion of your brokerage account contribute to margin and maintenance requirements. Other Assets, which may be reported on your statement, including insurance products that are distributed by FBS and Fidelity Insurance Agency, Inc. and mutual fund only accounts held directly with the fund (Fidelity Mutual Fund Accounts) are not carried by NFS, not covered by the Securities Investor Protection Corporation (SIPC) and do not count toward your margin and maintenance requirements. Assets held in brokerage accounts managed by Fidelity Personal and Workplace Advisors LLC (FPWA) are carried by NFS and covered by SIPC but do not contribute to your margin and maintenance requirements. **Short Account Balances** Securities sold short are held in a segregated short account. These securities are marked-to-market for margin purposes, and any increase or decrease from the previous week's value is transferred weekly to your margin account. Fidelity represents your short account balance as of the last weekly mark-to-market, not as of the statement end date. **Information About Your Option Transactions** Each transaction confirmation previously delivered to you contains full information about commissions and other charges, and such information is available promptly upon request. Assignments of American and European-style options are allocated among customer short positions pursuant to a random allocation procedure, a description is available upon request. Short positions in American-style options are liable for assignment anytime. The writer of a European-style option is subject to exercise assignment only during the exercise period. For more information, please call Fidelity at 800-544-6666. **Equity Dividend Reinvestment** Shares credited to your account resulted from transactions by FBS acting as agent for your account, or the Depository Trust Company (DTC). **Price Information/Total Market Value** The Total Market Value has been calculated out to 9 decimal places but the individual unit price is displayed in 5 decimal places. The Total Market Value represents prices obtained from various sources, may be impacted by the frequency with which such prices are reported and such prices are not guaranteed. Prices received from pricing vendors are generally based on current market quotes, but when such quotes are not available the pricing vendors use a variety of techniques to estimate value. These estimates, particularly for fixed income securities, may be based on certain minimum principal amounts (e.g. \$1 million) and may not reflect all of the factors that affect the value of the security, including liquidity risk. In certain situations, a price may be derived from a single market participant, also known as a "single broker quote". The prices provided are not firm bids or offers. Certain securities may reflect as N/A or unavailable where the price for such security is generally not available from a pricing source. The Market Value of a security, including those priced at par value, may differ from its purchase price and may not closely reflect the

using the FIFO method if shares were purchased at different times or prices. **Statement Mailing** We deliver statements at least four times during the calendar year for any account with a balance.

Statement Discrepancies Please review your statement and report any inaccuracies or discrepancies. Inquiries, concerns or questions regarding your brokerage account or the activity therein should be directed to FBS by calling 800-544-6666, and NFS, who carries your brokerage accounts, by calling 866-408-1138. Any oral communications regarding inaccuracies or discrepancies should be reconfirmed in writing to protect your rights, including those under the Securities Investor Protection Act (SIPA).

Material Changes Please advise us of material changes in your investment objectives or financial situation related to your brokerage account(s).

Mutual Funds and Performance Before investing, consider the funds' investment objectives, risks, charges and expenses. Contact Fidelity for a prospectus containing this information. Read it carefully. Performance data shown represents past performance and is no guarantee of future results. Investment return and principal value will fluctuate, so you may have a gain or loss when shares are sold. Current performance may be higher or lower than that quoted. Visit Fidelity.com/performance for most recent month-end performance.

Sales Loads & Fees Each fund reserves the right to terminate or modify its exchange privilege in the future. In connection with (i) access to, purchase, sale, exchange or redemption of, and/or maintenance of positions in mutual funds, ETFs and other investment products ("funds") or (ii) infrastructure needed to support such funds, some funds, or their investment affiliates, pay FBS and/or NFS sales loads and 12b-1 fees described in the prospectus as well as additional compensation for shareholder services, start-up fees, platform support and maintenance, and marketing, engagement and analytics programs. Additional information about the source(s) and amount(s) of compensation as well as other remuneration received by FBS or NFS will be furnished to you upon written request. At the time you purchase shares of funds those shares will be assigned either a load, transaction fee (TF) or no transaction fee (NTF) status. When you subsequently sell those shares, any fees applicable to your transaction will be assessed based on the status assigned to the shares at the time of purchase.

value at which the security may be sold or purchased based on various market factors. The sale or redemption of any fixed income security prior to maturity may result in a loss. Prices for Certificates of Deposits (CDs) on your statement are generally estimates and are not based on actual market prices. The secondary market for CDs is generally illiquid. You should always request a current valuation for your securities prior to making a financial decision or placing an order.

Executing Orders on the Floor of the NYSE The Floor broker may permit the Designated Market Maker to trade on parity with the order for some or all of the executions associated with filling that order, where such permission would not be inconsistent with the broker's best execution obligations.

SIPC Securities in accounts carried by NFS, a Fidelity Investments company, are protected in accordance with the SIPC up to \$500,000 (including cash claims limited to \$250,000). For details, including the SIPC brochure, please see www.sipc.org or call 1-202-371-8300. NFS has arranged for additional protection for cash and covered securities to supplement its SIPC coverage. Neither coverage protects against a decline in the market value of securities.

Fidelity Investments Fidelity Distributors Company LLC (FDC) is the distributor for Fidelity Funds with marketing and shareholder services provided by FBS or NFS. **Brokerage services are provided by FBS, which clears all transactions through its affiliate, NFS. NFS carries all brokerage accounts. FBS and NFS are members of the NYSE and SIPC.** Upon written request, Fidelity will mail an NFS financial statement, which is also available for inspection at its office. Fidelity Investments (with pyramid logo) is a trademark of FMR LLC.

FPWA Services Fidelity Go®, Fidelity Managed FidFoliosSM and Fidelity® Strategic Disciplines are advisory services offered by FPWA, a registered investment adviser. Fidelity® Strategic Disciplines includes the Breckinridge Intermediate Municipal Strategy, the Fidelity® Equity-Income Strategy, the Fidelity® Tax-Managed U.S. Equity Index Strategy, the Fidelity® U.S. Large Cap Equity Strategy, the Fidelity® International Equity Strategy, the Fidelity® Tax-Managed International Equity Index Strategy, the Fidelity® Intermediate Municipal Strategy and the Fidelity® Core Bond Strategy. Fidelity® Wealth Services are advisory services offered by FPWA or Fidelity Personal Trust Company, FSB (FPTC), a federal savings bank. Nondeposit investment products and trust services offered by FPTC and its affiliates are not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency, are not obligations of any bank, and are subject to risk, including possible loss of principal. **These advisory services are provided for a fee.** FBS, NFS, FDC, FPWA and FPTC are direct or indirect subsidiaries of FMR LLC.

Miscellaneous Mutual fund shares, other securities held in your account, and insurance products are neither deposits nor obligations of, nor endorsed or guaranteed by, any bank or other depositing institution, nor are they federally insured by the FDIC or any other agency. If you request a reprint of your statement, the disclosure information may not be the same as the information originally provided. To confirm that an authorized, direct deposit has been made to your Fidelity Account or Fidelity Mutual Fund Account, call Fidelity at 1-800-544-5555.

588130.55.0



This page intentionally left blank



FIDELITY ACCOUNT ANTHONY A GRECO AND ANNETTE M KELLER -
WITH RIGHTS OF SURVIVORSHIP

▶ Account Number: [REDACTED] 2579

Envelope # BPBFLZBBBQCXX

ANTHONY ANGELO GRECO
ANNETTE M KELLER
36959 S LAMBERT LN
TUCSON AZ 85739-1217

Your Account Value: \$40.55

Change from Last Period: ▲ \$0.55

	This Period	Year-to-Date
Beginning Account Value	\$40.00	\$136.10
Additions	4,000.00	18,700.00
Subtractions	-4,000.00	-18,800.00
Change in Investment Value *	0.55	4.45
Ending Account Value **	\$40.55	\$40.55
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$40.55	

Contact Information

Online	Fidelity.com
FAST®-Automated Telephone	(800) 544-5555
Customer Service	(800) 544-6666

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

** Excludes unpriced securities.





Account Summary

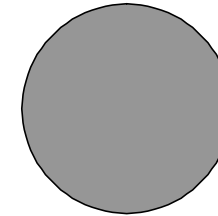
Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Account Value: **\$40.55**

Account Holdings

Change in Account Value **▲ \$0.55**

	This Period	Year-to-Date
Beginning Account Value	\$40.00	\$136.10
Additions	4,000.00	18,700.00
Deposits	3,000.00	17,700.00
Exchanges In	1,000.00	1,000.00
Subtractions	-4,000.00	-18,800.00
Withdrawals	-1,000.00	-2,000.00
Exchanges Out	-3,000.00	-14,800.00
Cards, Checking & Bill Payments	-	-2,000.00
Change in Investment Value *	0.55	4.45
Ending Account Value	\$40.55	\$40.55
Accrued Interest (AI)	0.00	
Ending Account Value Incl. AI	\$40.55	



100% Core Account (\$40)

Top Holdings

Description	Value	Percent of Account
Fidelity Government Money Market	\$40	100%
Total	\$40	100%

Please note that, due to rounding, percentages may not add to 100%.

Income Summary

	This Period	Year-to-Date
Taxable	\$0.55	\$4.45
Dividends	0.55	4.45
Total	\$0.55	\$4.45

Total Account Trades Jul 2022 - Jun 2023: 0

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

S

MR_CE_BPBFLZBBBQCXX_BEBBB 20230630



Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

Core Account and Credit Balance Cash Flow

	This Period	Year-to-Date
Beginning Balance	\$40.00	\$136.10
Investment Activity		
Dividends, Interest & Other Income ^D	0.55	4.45
Exchanges In	1,000.00	1,000.00
Exchanges Out	-3,000.00	-14,800.00
Total Investment Activity	-\$1,999.45	-\$13,795.55
Cash Management Activity		
Deposits	3,000.00	17,700.00
Withdrawals	-1,000.00	-2,000.00
Debit Card Activity	-	-2,000.00
Total Cash Management Activity	\$2,000.00	\$13,700.00
Ending Balance	\$40.55	\$40.55

^D Includes dividend reinvestments.

Holdings

Core Account

Description	Beginning Market Value Jun 1, 2023	Quantity Jun 30, 2023	Price Per Unit Jun 30, 2023	Ending Market Value Jun 30, 2023	EAI (\$) / EY (%)
FIDELITY GOVERNMENT MONEY MARKET (SPAXX) -- 7-day yield: 4.75%	\$40.00	40.550	\$1.0000	\$40.55	\$1.24 3.060%
Total Core Account (100% of account holdings)	\$40.00			\$40.55	\$1.24
Total Holdings				\$40.55	\$1.24

MR_CE_BPBFLZBBBQCXX_BEBBB 20230630 S



Holdings

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

EAI **Estimated Annual Income (EAI) & Estimated Yield (EY)**- EAI is an estimate of annual income for a specific security position over the next rolling 12 months. EAI may be negative on short & EY positions. EY is calculated by dividing the current EAI for a security position by its statement closing date market value. EAI and EY are estimates only and may include return of principal and/or capital gains, which would render them overstated. Actual income and yield might be lower or higher than the estimated amounts. **For calculation details, refer to the "Additional Information and Endnotes" section.**

Activity

Dividends, Interest & Other Income

(Includes dividend reinvestment)

Settlement Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
06/30	FIDELITY GOVERNMENT MONEY MARKET	31617H102	Dividend Received	-	-	\$0.55
Total Dividends, Interest & Other Income						\$0.55

Deposits

Date	Reference	Description	Amount
06/01	000008177018028	Deposit Pentagon Fed	\$3,000.00
Total Deposits			\$3,000.00

Exchanges In

Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
06/28	Z08-458911-1		Transferred From	-	-	\$1,000.00
Total Exchanges In						\$1,000.00

Withdrawals

Date	Reference	Description	Amount
06/28	Wire Tfr To Bank	WD69810932 ANTHONY A GRECO PENTAGON FEDERAL CREDIT UNION *****8028	-\$1,000.00

MR_CE_BPFBZBBBQCXX_BBBB 20230630 S



Activity

Account # ██████████ 2579
ANTHONY ANGELO GRECO - JOINT WROS

Withdrawals (continued)

Date	Reference	Description	Amount
Total Withdrawals			-\$1,000.00

Exchanges Out

Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Amount
06/01	Z20-297963-1		Transferred To	-	-	-\$3,000.00
Total Exchanges Out						-\$3,000.00

Core Fund Activity

For more information about the operation of your core account, please refer to your Customer Agreement.

Settlement Account

Date	Type	Transaction	Description	Quantity	Price	Amount	Balance
06/01	CASH	You Sold	FIDELITY GOVERNMENT MONEY MARKET @ 1	-3,000.000	\$1.0000	-\$3,000.00	-\$2,960.00
06/01	CASH	You Bought	FIDELITY GOVERNMENT MONEY MARKET MORNING TRADE @ 1	3,000.000	1.0000	3,000.00	40.00
06/30	CASH	Reinvestment	FIDELITY GOVERNMENT MONEY MARKET REINVEST @ \$1.000	0.550	1.0000	0.55	40.55
Total Core Fund Activity						\$0.55	

Additional Information and Endnotes

The following interested party information is on file for your account:

ANNETTE M KELLER
240 WHITMOOR TER
SILVER SPRING MD 20901-1521

▶ Please go to [fidelity.com/disclosures](https://www.fidelity.com/disclosures) to review important legal and regulatory disclosures. 1080017.1.0

MR_CE_BPBFLZBBBQCXX_BBBBB 20230630 S

Additional Information and Endnotes

Account # [REDACTED] 2579
ANTHONY ANGELO GRECO - JOINT WROS

- ▶ In compliance with U.S. Securities and Exchange Commission requirements, Fidelity regularly provides you with documents that describe the various accounts and services that Fidelity offers. The Fidelity Brokerage Services (FBS) and Fidelity Personal and Workplace Advisors LLC (FPWA) Customer Relationship Summaries (Form CRS) are provided with printed statements mailed at quarter-end and as a link in email notices of statement delivery. These and other important disclosure documents, including the Products, Services, and Conflicts of Interest (PSCOI), may be updated periodically and are available to you for review online at <https://communications.fidelity.com/information/crs/>. In addition, you may contact Fidelity at any time to request a printed copy. 919834.10.0

Estimated Annual Income (EAI) & Estimated Yield (EY) - EAI for fixed income is calculated using the coupon rate. For all other securities, EAI is calculated using an indicated annual dividend (IAD). The IAD is an estimate of a security's dividend payments for the next 12 months calculated based on prior and/or declared dividends for that security. EY reflects only the income generated by an investment and not changes in its price which may fluctuate. Interest and dividend rates are subject to change at any time and may be affected by current and future economic, political and business conditions. EAI and EY are provided for informational purposes only and should not be used or relied on for making investment, trading or tax decisions. EAI and EY are based on data obtained from information providers believed to be reliable, but no assurance can be made as to accuracy, timeliness or completeness. **Please refer to the Help/Glossary on Fidelity.com for additional information regarding these calculations.**

Copyright 2022, S&P Global Market Intelligence. Reproduction of any information, data or material, including ratings ("Content") in any form is prohibited except with the prior written permission of the relevant party. Such party, its affiliates and suppliers ("Content Providers") do not guarantee the accuracy, adequacy, completeness, timeliness or availability of any Content and are not responsible for any errors or omissions (negligent or otherwise), regardless of the cause, or for the results obtained from the use of such Content. In no event shall Content Providers be liable for any damages, costs, expenses, legal fees, or losses (including lost income or lost profit and opportunity costs) in connection with any use of the Content. A reference to a particular investment or security, a rating or any observation concerning an investment that is part of the Content is not a recommendation to buy, sell or hold such investment or security, does not address the suitability of an investment or security and should not be relied on as investment advice. Credit ratings are statements of opinions and are not statements of fact.

Moody's® Copyright 2022, Moody's Investors Service, Inc. ("Moody's"). Moody's ratings ("Ratings") are proprietary to Moody's or its affiliates and are protected by copyright and other intellectual property laws. Ratings are licensed to Licensee by Moody's. RATINGS MAY NOT BE COPIED OR OTHERWISE REPRODUCED, REPACKAGED, FURTHER TRANSMITTED, TRANSFERRED, DISSEMINATED, REDISTRIBUTED OR RESOLD, OR STORED FOR SUBSEQUENT USE FOR ANY SUCH PURPOSE, IN WHOLE OR IN PART, IN ANY FORM OR MANNER OR BY ANY MEANS WHATSOEVER, BY ANY PERSON WITHOUT MOODY'S PRIOR WRITTEN CONSENT. Moody's® is a registered trademark.

Please go to [Fidelity.com/disclosures](https://www.fidelity.com/disclosures) to review important legal and regulatory disclosures. Historical statements, confirms and other regulatory documents are available to access and download at [Fidelity.com/statements](https://www.fidelity.com/statements).

For more information about your statement, please refer to our **Frequently Asked Questions** document at [Fidelity.com/statements](https://www.fidelity.com/statements).



Information About Your Fidelity Statement

Lost or Stolen Cards For 24-Hour worldwide customer service, call 800-529-2164 for American Express or 800-323-5353 for Fidelity® Debit Card.

Additional Investments with Fidelity Make checks payable to Fidelity Investments. Include your account number on the check. For retirement and health savings accounts (HSA), designate in the memo field whether your contribution is for the current or prior year. Mail checks or other inquiries to: Fidelity Investments, P.O. Box 770001, Cincinnati, OH 45277-0003.

Income Summary Shows income by tax status for the statement and year-to-date periods. Except for interest income earned on, or distributed by, tax-exempt securities, Fidelity reports dividends and capital gains held in taxable accounts as taxable income. A portion of income reported as tax-exempt income may be subject to alternative minimum taxes and/or state and local taxes. In Traditional IRAs, Rollover IRAs, SEP-IRAs, SIMPLE IRAs and Keoghs, earnings are reported as tax-deferred income. In Roth IRAs and HSAs, earnings are reported as tax-exempt income as they may be federally tax-exempt if certain conditions are met.

Cost Basis, Gain/Loss, and Holding Period Information NFS is required to report certain cost basis and holding period information to the IRS on Form 1099-B. Unless otherwise specified, NFS applies the average cost method for open-end mutual funds and the first-in, first-out (FIFO) method for all other securities. Cost basis is adjusted for wash sales on securities with the same CUSIP held in the same account (unless your account receives mark-to-market reporting). Your statement may not reflect all adjustments required for tax purposes. Customers should consult their tax advisors for further information.

Cost Fidelity provides purchase cost information for securities held in retirement and HSA accounts. Such information may be adjusted for certain transactions and does not reflect dividends or capital gains reinvestments. Fidelity reports transaction profit or loss information when securities are sold within a retirement or HSA account. Transaction profit or loss is calculated by subtracting purchase cost from sales proceeds

using the FIFO method if shares were purchased at different times or prices. **Statement Mailing** We deliver statements at least four times during the calendar year for any account with a balance.

Statement Discrepancies Please review your statement and report any inaccuracies or discrepancies. Inquiries, concerns or questions regarding your brokerage account or the activity therein should be directed to FBS by calling 800-544-6666, and NFS, who carries your brokerage accounts, by calling 866-408-1138. Any oral communications regarding inaccuracies or discrepancies should be reconfirmed in writing to protect your rights, including those under the Securities Investor Protection Act (SIPA).

Material Changes Please advise us of material changes in your investment objectives or financial situation related to your brokerage account(s).

Mutual Funds and Performance Before investing, consider the funds' investment objectives, risks, charges and expenses. Contact Fidelity for a prospectus containing this information. Read it carefully. Performance data shown represents past performance and is no guarantee of future results. Investment return and principal value will fluctuate, so you may have a gain or loss when shares are sold. Current performance may be higher or lower than that quoted. Visit Fidelity.com/performance for most recent month-end performance.

Sales Loads & Fees Each fund reserves the right to terminate or modify its exchange privilege in the future. In connection with (i) access to, purchase, sale, exchange or redemption of, and/or maintenance of positions in mutual funds, ETFs and other investment products ("funds") or (ii) infrastructure needed to support such funds, some funds, or their investment affiliates, pay FBS and/or NFS sales loads and 12b-1 fees described in the prospectus as well as additional compensation for shareholder services, start-up fees, platform support and maintenance, and marketing, engagement and analytics programs. Additional information about the source(s) and amount(s) of compensation as well as other remuneration received by FBS or NFS will be furnished to you upon written request. At the time you purchase shares of funds those shares will be assigned either a load, transaction fee (TF) or no transaction fee (NTF) status. When you subsequently sell those shares, any fees applicable to your transaction will be assessed based on the status assigned to the shares at the time of purchase.

Additional Information About Your Brokerage Account, If Applicable

Free credit balances (FCB) are funds payable to you on demand. FCB are subject to open commitments such as uncleared checks and exclude proceeds from sales of certificated securities without delivery of the certificate. If your FCB is swept to a core position, you can liquidate the core position and have the proceeds sent to you or held in your account subject to the terms of your account agreement. Required rule 10b-10(a) information not contained herein will be provided on written request. Fidelity may use this free credit balance in connection with its business, subject to applicable law. **Assets Separate from Your Brokerage Account** Only securities in the margin portion of your brokerage account contribute to margin and maintenance requirements. Other Assets, which may be reported on your statement, including insurance products that are distributed by FBS and Fidelity Insurance Agency, Inc. and mutual fund only accounts held directly with the fund (Fidelity Mutual Fund Accounts) are not carried by NFS, not covered by the Securities Investor Protection Corporation (SIPC) and do not count toward your margin and maintenance requirements. Assets held in brokerage accounts managed by Fidelity Personal and Workplace Advisors LLC (FPWA) are carried by NFS and covered by SIPC but do not contribute to your margin and maintenance requirements. **Short Account Balances** Securities sold short are held in a segregated short account. These securities are marked-to-market for margin purposes, and any increase or decrease from the previous week's value is transferred weekly to your margin account. Fidelity represents your short account balance as of the last weekly mark-to-market, not as of the statement end date. **Information About Your Option Transactions** Each transaction confirmation previously delivered to you contains full information about commissions and other charges, and such information is available promptly upon request. Assignments of American and European-style options are allocated among customer short positions pursuant to a random allocation procedure, a description is available upon request. Short positions in American-style options are liable for assignment anytime. The writer of a European-style option is subject to exercise assignment only during the exercise period. For more information, please call Fidelity at 800-544-6666. **Equity Dividend Reinvestment** Shares credited to your account resulted from transactions by FBS acting as agent for your account, or the Depository Trust Company (DTC). **Price Information/Total Market Value** The Total Market Value has been calculated out to 9 decimal places but the individual unit price is displayed in 5 decimal places. The Total Market Value represents prices obtained from various sources, may be impacted by the frequency with which such prices are reported and such prices are not guaranteed. Prices received from pricing vendors are generally based on current market quotes, but when such quotes are not available the pricing vendors use a variety of techniques to estimate value. These estimates, particularly for fixed income securities, may be based on certain minimum principal amounts (e.g. \$1 million) and may not reflect all of the factors that affect the value of the security, including liquidity risk. In certain situations, a price may be derived from a single market participant, also known as a "single broker quote". The prices provided are not firm bids or offers. Certain securities may reflect as N/A or unavailable where the price for such security is generally not available from a pricing source. The Market Value of a security, including those priced at par value, may differ from its purchase price and may not closely reflect the

value at which the security may be sold or purchased based on various market factors. The sale or redemption of any fixed income security prior to maturity may result in a loss. Prices for Certificates of Deposits (CDs) on your statement are generally estimates and are not based on actual market prices. The secondary market for CDs is generally illiquid. You should always request a current valuation for your securities prior to making a financial decision or placing an order.

Executing Orders on the Floor of the NYSE The Floor broker may permit the Designated Market Maker to trade on parity with the order for some or all of the executions associated with filling that order, where such permission would not be inconsistent with the broker's best execution obligations.

SIPC Securities in accounts carried by NFS, a Fidelity Investments company, are protected in accordance with the SIPC up to \$500,000 (including cash claims limited to \$250,000). For details, including the SIPC brochure, please see www.sipc.org or call 1-202-371-8300. NFS has arranged for additional protection for cash and covered securities to supplement its SIPC coverage. Neither coverage protects against a decline in the market value of securities.

Fidelity Investments Fidelity Distributors Company LLC (FDC) is the distributor for Fidelity Funds with marketing and shareholder services provided by FBS or NFS. **Brokerage services are provided by FBS, which clears all transactions through its affiliate, NFS. NFS carries all brokerage accounts. FBS and NFS are members of the NYSE and SIPC.** Upon written request, Fidelity will mail an NFS financial statement, which is also available for inspection at its office. Fidelity Investments (with pyramid logo) is a trademark of FMR LLC.

FPWA Services Fidelity Go®, Fidelity Managed FidFoliosSM and Fidelity® Strategic Disciplines are advisory services offered by FPWA, a registered investment adviser. Fidelity® Strategic Disciplines includes the Breckinridge Intermediate Municipal Strategy, the Fidelity® Equity-Income Strategy, the Fidelity® Tax-Managed U.S. Equity Index Strategy, the Fidelity® U.S. Large Cap Equity Strategy, the Fidelity® International Equity Strategy, the Fidelity® Tax-Managed International Equity Index Strategy, the Fidelity® Intermediate Municipal Strategy and the Fidelity® Core Bond Strategy. Fidelity® Wealth Services are advisory services offered by FPWA or Fidelity Personal Trust Company, FSB (FPTC), a federal savings bank. Nondeposit investment products and trust services offered by FPTC and its affiliates are not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency, are not obligations of any bank, and are subject to risk, including possible loss of principal. **These advisory services are provided for a fee.** FBS, NFS, FDC, FPWA and FPTC are direct or indirect subsidiaries of FMR LLC.

Miscellaneous Mutual fund shares, other securities held in your account, and insurance products are neither deposits nor obligations of, nor endorsed or guaranteed by, any bank or other depositing institution, nor are they federally insured by the FDIC or any other agency. If you request a reprint of your statement, the disclosure information may not be the same as the information originally provided. To confirm that an authorized, direct deposit has been made to your Fidelity Account or Fidelity Mutual Fund Account, call Fidelity at 1-800-544-5555.

58130.55.0

MR_CE_BPFLZBBBQCXX_BB55 20230630



This page intentionally left blank

Exhibit C

April 17, 2023 recorded conversation about Mr. Greco's fraudulent auto insurance claim (transcript/pdf)

Audio may be downloaded from

https://drive.google.com/drive/u/1/folders/1KOyYk_OVbrXmsOhGtjA1TmaDCEUznliA

Anthony Greco 0:00

Her name is Stephanie. Ta GIAHT AG.

Annette Keller 0:12

Okay.

Anthony Greco 0:14

Remember is 52020612. She's the final little standing between me and getting a check from Geico. She says she's the approving authority. After I spoke with somebody named Ryan, I have another phone number for him. And you know, he said that actually long conversation about what would happen if I do this, that or the other, if I prepared the car was not prepared to the car, cancel my claim for the repairs and all that he finally said, you will get \$876 If you cancel your complaint. So I told you this morning that I decided to cancel my complaint. But she said he said You asked to call this person named Stephanie, who's going to make the final decision. So I call her Friday, two or three times I didn't get a call that's messages in get a call back. She called me this morning and said that she is the final decider on whether or not to approve the settlement. I said, I thought that was done when I talked with Ryan. And I told her that based on that conversation, I've made many decisions over the weekend.

Like I told you this morning, and I'm in the process of buying a new car and doing all these other things. And she said, Well, she can't approve. Until she gets, you see examined she gets puts me on record for at least 30 minutes about the accident. So I already explained the accident to the adjuster to the examiner, and to the estimator. And I told her what Ryan said and she said, Well, that's in this is me. And she sounds very, very officious. I see is a really company woman not not as customer woman, but a company woman. Anyway, the final outcome is she's she's kept saying I need more and more and more and more. She put me on the same phone with Mr. Ryan and I, he told her what we talked about.

And she still said, we need more than one. So finally she said, I need your bank statements. The middle of May to the middle of April, I said, Well, she says I want to see how you use your car, where you go, what you did with your car. And I said, What's that got approved? She said, Well, I need to know how you use your car. And then I began to get upset. And I've never heard of anything so ridiculous. I said I live in a senior citizen community. I goes to the library, I go to the stores, I go to doctor's appointments, I go shopping, and I said that's basically all I do. She said that's all right, but I need the best. And I kept getting upset, you know how I get when I'm questioned by somebody who was not being reasonable. And she said I can't do anything until I get those base statements. And I said what I don't have a My daughter has those. And she says, Well, however, give me those bank statements. And I'll see what I can do. She still won't commit to me getting the check that Ryan said I was hit.

Annette Keller 4:12

Okay, so I have a lot of detail about your interaction with her. But I can you give me some information about what's actually going on. So you filed a complaint against GEICO or a claim a claim? Okay,

Anthony Greco 4:30

why would I file a complaint?

Annette Keller 4:31

I think it was just a slip because you said complaint but then that didn't make sense. So you filed a claim, and this was for the damage on the doors. Okay.

Anthony Greco 4:44

And the damage came out to be more than the repair. And Mr. Ryan Ryan says, If you cancel me repair, we'll send you a check for \$876 But you have to call this woman named Stephanie first She took off Friday. And even though I tried to call her three times, she didn't return my calls.

Annette Keller 5:06

So, okay, all right. Okay, so So basically, if you're going to cancel your claim, that means you're keeping the car right. So they want you to cancel the claim and they'll pay you \$876

Anthony Greco 5:24

That's what she said. That's up to her.

Annette Keller 5:28

Okay, but so, so, so basically, you'd be keeping your enclave?

Anthony Greco 5:34

No, I don't want to keep it. I already told you. Let's not go backwards.

Annette Keller 5:39

Okay, but why? Why will \$876 help you?

Anthony Greco 5:45

To buy another car?

Annette Keller 5:48

You can buy a car for \$876? Is it? \$8,000 8776 780

Anthony Greco 5:58
and \$68?

Annette Keller 6:06
Okay, 1000.

Unknown Speaker 6:07
Okay. Okay. 1000. Yeah.

Annette Keller 6:11
Okay, so she says

Anthony Greco 6:12
I came. She says it looks like your car might not be able to support a Collette claim. I said, when the claim was already approved by this Orion, she said, Well, I have to give final approver. And she said, I can't do that until I see your bank statement. So to see my bank statement to see how many gas stations, how many times I went to the library, how many times I was shopping. She asked me all kinds of questions about what Walmart I linked to how long I got to stay there. What time I got there. I mean, she's an interrogator.

Annette Keller 6:51
She sounds like an investigator.

Anthony Greco 6:55
That's what her job is. Okay.

Annette Keller 6:57
So you've got an investigator asking for your bank statements. It sounds like they're investigating you.

Anthony Greco 7:03
I know. That's what she says she's doing. Okay. So she, um, I talked to Ryan, she put me on the phone with this guy named Ryan. And I told her what he told me about canceling the repairs. And so they tried to do that Friday. But Stephanie was she said she was didn't work on Friday. So when when he told me that, if I cancelled repairs, I get \$876. That's what started me thinking about the whole trip and casita and everything else. So I spent two and a half hours with Carlos Saturday buying another car. So she was calling us to say, give her a call center. The bank statements from the Pentagon Federal Credit Union. From the middle of May to the middle of April. I got upset with her because she was interrogating me or I don't like to be interrogated. So if she wants to debate statements, give it to her and tell her to call me when she has a decision.

Annette Keller 8:13
Okay, so basically, they're going to total the car. Is that right? Okay, and give you a check for 8776 \$1,776 and then they will take title on the car. So basically, they'll

Anthony Greco 8:33
take it to the salvage yard.

Annette Keller 8:36
Okay, now is your car drivable? Like Will it pass inspection? Which were the Enclave?

Anthony Greco 8:48
Yes, so the damage shouldn't have any new inspections.

Annette Keller 8:53
I mean, if the if the car can be so I mean, if the car yeah. You might be able to sell it for more than 8887 76.

Anthony Greco 9:08
No, that's, that's the value. Geico put a value of \$8,768 on the car. Okay, that's what that's what their estimator came up with. I can't argue with that. That's a fair price. I only paid 10,000 for it five years ago.

Annette Keller 9:29
Yeah, but cars are more expensive used cars and more expensive now. 2012. What please my judgment? No, no. I'm explaining to you something. Okay. Can I explain this to you? 2012 Buick enclaves are going for like \$14,000 right now because us cars have gone up in value. So maybe they're questioning why you want to get rid of your enclave for 87 \$100 So she's questioning

Anthony Greco 10:02
whether that the damages came from GEICO or someplace else. She wants my bank statements to see where I've driven the car during the month prior to the incident. Oh, they told me that.

Annette Keller 10:20

So she told me that so she's trying to determine whether or not your claim is valid.

Anthony Greco 10:27

She's trying to determine whether or not I was driving out of Arizona. I said, I don't go anywhere. I said, I haven't left Arizona in three or four years. So Arizona in five years, so there was no police. She wants to see where I've driven during the month the previous previous to the the damage to my car. She's being super super. I told her your computer company person you're trying to save GEICO every nickel.

Annette Keller 11:01

Okay, well, let me let me give her a call. And I'll talk to her. And then she just needs the bank statements, right?

Anthony Greco 11:09

Yeah, but don't get into this meal. If she wants to bake statements given to her, and then tell her to call me when she makes a decision.

Annette Keller 11:18

Okay. I will don't get him. I don't know anything about your oxygen anyways, so I can't really talk. I said, I don't know anything about your accident anyways, so there's nothing I can tell her.

Anthony Greco 11:35

Stay away from speculating anything. Yes. Give her what she wants her to call me when she decide. And I spent a lot of time on the phone with her and 30 minutes he recorded my incident of the exit everything at Walmart for 30

Annette Keller 11:56

minutes. So this happened at Walmart.

Anthony Greco 11:59

How many cars were in the lot? What? What lane? Were you in? What? What parking space? I mean, she's, she's very meticulously ridiculously meticulous. Okay, it's to the point. It's point to the point where it's absolutely ridiculous. The question she asked me for my pay statements. To see where I've driven my car in the last month. gonna prove?

Annette Keller 12:30

I don't know. Oh, I'll give her I'll call her and get her the bank statements. So she wants them from March and April.

Anthony Greco 12:39

She saved from the 15th or 15th of paper. Okay, got it. Go. Don't get into a debate with her. Just.

Annette Keller 12:48

I am not going to beat her

Anthony Greco 12:52

by telling her that. Sounds like she's trying to get away from paying anything. For what happened to my car. And see you're really upset saying anyway. You know how I get when I am questioned and get into a debate with her. Just give them a really stupid, vague statement of who she was. And tell her to call me when she makes a decision.

Annette Keller 13:20

Okay, all right. Yeah. Thank you. You're welcome. Yes, I do. You're gonna give her a call. Okay. Bye bye.

As the technique. Hi, is this I'm calling for Anthony Greco. Is this Stephanie are Tiffany Kennedy. Oh, I think he gave me the wrong number. Is this the right

Speaker 3 14:18

now? He keeps on calling me. Stephanie. But I don't correct him because a lot of people do that.

Annette Keller 14:24

Okay. Oh, can I have your name? Tiffany T IFF.

Speaker 3 14:28

I'm sorry, who am I speaking went because I had the Verify of speaking with

Annette Keller 14:33

Annette Keller. Annette Keller. Yes. I'm his daughter related.

Unknown Speaker 14:37

Oh, you're his daughter. Okay.

Annette Keller 14:39

I have His power of attorney as well.

Unknown Speaker 14:41

Okay, how can I help you? First of all,

Annette Keller 14:44

what's your full name

Speaker 3 14:44

with an E Targa? TGA Okay, that's

Annette Keller 14:49

like totally different than the name he gave me. Okay,

Speaker 3 14:52

that's fine. We understand where he's coming from. He kind of keeps on saying that he has dementia which, you know, I keep saying members Oh, through that. So I understand

Annette Keller 15:01

he does. He says he has his, it seems to be worsening recently. So it's been really tough trying to, you know, get things straight out the gate. Yeah. So, but you know, his doctor hasn't his doctor has, I've been asking if we could get a second, his doctor hasn't really done anything for him. And I've asked it that he get a referral to Barrow Neurological Institute in Phoenix, and she refuses to give her a referral for a second opinion, which I've never heard before. But it's his doctor, so I can't really interfere. And so he's actually not getting treatment for his dementia. And you know, so I'm, you know, I have to apologize. He said that you were on the phone a long time. And

Speaker 3 15:56

yes, yes, definitely. And I'm sorry for that the way that conversation ended, I am trying to help him. I don't. So I will talk to my supervisor, though, about all of this, because I understand his age, I understand he has dementia, we're asking a lot for him to recall anything in my opinion. So we're leaving that alone, I'm actually just going to close my case and leave it be I just couldn't do it without at least making the attempt to work with them.

Annette Keller 16:26

Okay. So when you say close your case, what does that mean?

Speaker 3 16:32

That means that we'll have for customer service reasons, really, I feel that this is not a meaningful, meaningful to continue. There. So I can't really discuss more with you, because you're not on the policy,

Annette Keller 16:50

I actually have this power of attorney, can I send it to you?

Speaker 3 16:55

You may but I just want to let you know off the record, at least that we're closing it down, he'll still be taken care of. So you don't really need to do that. If you don't want to unless you really want to know what the issues are, then you can send the power of attorney and I'm happy to discuss it with you. But for customer service reasons. I kind of just, I spoke to my supervisor and said, just leave it alone, please. Understanding any extenuating circumstances that he's in, you know, would

Annette Keller 17:23

leave one alone. Was he harassing you? Or is there a problem?

Speaker 3 17:27

Um, no. Well, the language was not great, nor him telling me to shut up. But it's fine. I'm sorry. I apologize. Like I said, I've had family members who I've dealt with it before the dementia, it's fine.

Annette Keller 17:42

I'll say the thing is the reason the problem I'm having is he has symptoms of frontal temporal, of, of a type of dementia, that's behavioral, Frontotemporal dementia, which people lose kind of lose control of their judgment and can become aggressive. Yeah, you know, argue argumentative, and his,

Speaker 3 18:09

you know, yeah, it's not even. It doesn't make sense. Yeah.

Annette Keller 18:14

And, and his neurologists will not evaluate him for that she's sending him to get like neurological assessments and stuff. But the behavioral variant, Frontotemporal dementia, is behavior based, then the only way you can really diagnose it is to get a record of the person's accidents, like traffic violations, their family, their interactions with family and other people, and she won't do that. So he's basically not this behavior that you've observed. She's not, he's not getting any treatment or help for it, which is very frustrating, and I appreciate your patience, and I'm very sorry that you had to deal with anything.

Speaker 3 18:53

I just, I hope that it didn't upset him too much. He is extremely upset. So, you know, obviously, I'm very sorry. You know, we as a company, Geico, we care we do and you know, I I definitely don't want him to think that we're doing anything against him. I know that that he might feel that way anyways. But I just want to really just say from the bottom my heart, I am very sorry. And when I mean to upset him, it's just what I had to do for my job. So and I hope he can understand that a little bit, but we're just gonna leave it alone at this point. So

Annette Keller 19:30

Well, thank you.

Speaker 3 19:31

Yeah, and it's really not a problem. Honestly. I've handled it before on a personal level. So you know, I'm so sorry that you're having to deal with this too.

Annette Keller 19:39

So and also, you know, if you can't pay out the claim, I mean, my father is not destitute. You know, he's he's just like I said, he's just has these behavioral issues. Yeah, so I'm very sorry that you had to experience it.

Speaker 3 19:57

No, no, it's it's perfectly fine. Um, you know, like I said, as, you know, as a person in general, I do care about the fact that like, we are asking a lot from him and his age, I don't think it's reasonable to continue with this. So he has coverage, there's no, no problem I see with just moving forward. Without like, continuing. That makes sense. Okay, but But yeah, so I don't know what he's what he has told you. And I just want to make sure that, you know, definitely apologize for the whole situation. And

Annette Keller 20:31

he admitted that he had been rude to you. And I just in I don't even know what I don't know anything about this accident. I don't really know anything about what he's what's going on with this. Or, you know, he won't allow me to, well, similar to your situation, he won't allow me to have much control over his, you know, comings and goings and doing so he's trying to buy a car. But he won't accept help from me. And I don't really know anything about his accident. He's very independent and does not like to be questioned.

Speaker 3 21:08

So, and that's what my job is, is to find out what happened. So I can understand why it would definitely make him upset. So that Yeah, well, it wasn't any questioning of his integrity or anything like that. It's just something that we have to do sometimes. And it's literally just, it's fine. He's fine. At least he understands that he has dementia. That's a good thing. I mean, all my past experience, they were always in denial.

Annette Keller 21:37

Oh, yeah. He's he's having a lot of problems with. He's having a lot of problems lately. And he's also have been having severe and worsening headaches. And it's just really infuriating to me that his neurologist will not give a second a referral for a second opinion, because I've never heard that happening before. And so he's

Speaker 3 22:01

even with your power of attorney that is very surprising. Yeah, it is

Annette Keller 22:04

very surprising. And you know, he won't. He's asked her for it, and he won't do it. They just say, Oh, no, you don't need it, which is, I've never heard this before. I would absolutely fire her and go to another neurologist, you know, but I can't it's not my relationship. And I have a power of attorney, but I can't like overrule him. So. But yeah, I mean, it's possible his claim is not valid, but he just doesn't know that. Yeah, you know, and I'm fine. Okay.

Speaker 3 22:38

I think he's fine. Because I just haven't reached out to the claims department, probably, I wouldn't say Wednesday would probably be the same thing. What I'm doing is I'm going to be closing up my stuff. And, you know, once I close it, he's good to go.

Annette Keller 22:51

Okay. And, you know, I and like I said, it's possible, his claim is not valid, and he just doesn't know it. What I can do is, you know, if you want to raise his insurance or whatever, you know, that would be understandable. I think, you know, it, would it be possible for you to not cancel him.

Unknown Speaker 23:12

Yeah, he's fine. Okay. And

Annette Keller 23:14

well, you know,

Speaker 3 23:15

I'm not in charge of that stuff. But I'm not. That's not what we do here at GEICO. We don't normally do stuff like that. Okay, it's perfectly fine. If you're worried about that.

Annette Keller 23:24

I think he realizes that he will not be driving much longer. Yeah. And this is like, he's panicking.

Speaker 3 23:33

Yeah. And well, and so I mean, I do recommend maybe turning in the power of attorney to the claims department, I can give you the fax number for that. Sure. And the claim number, because in case any issues come up with the, with the claim as far as payments are concerned.

Annette Keller 23:52

Okay. And thank you very much. And once again, I'm very sorry, and thank you for, you know, working with my dad.

Speaker 3 24:01

No, no, you're you're fine. I just I feel bad because I know it must be frustrating with them for him. So it's hard, and also for you so. So here's a claim number if you have a pen and paper ready. Sure. And then for this, all you're doing is just you need the claim number on the power of attorney. So it goes directly into the claim, maybe as a cover photo, you could also do that as well, but here's the claim number pretty long. Okay. 062062959959310310, another 00101101030030

Annette Keller 24:46

All right,

Speaker 3 24:53

and the fax number is 866568 2132 Okay, so anything that you fax, it will take 24 hours or 24 to 48 hours to get into the claim. So let's say for example, you put it in today, then we'll receive it likely on Wednesday, because I have to go to an imaging center first. So, um, but yeah, I highly recommend and if you have questions for me, you can call and I'll just check for the power of attorney and I can answer your questions. But she does have a claims adjuster as well. I can give you their information if you need it. Okay. Her name is Alondra A L. O is an Oscar and is a Nancy. D as in David, ours and Robert A's and Alex. And her. Oh, does it changed hands? Oh, I'm so sorry. It's actually a full left. Okay. I apologize. Okay, so Celeste, phone number is 520-258-0761. Okay. And sorry, had to cancel his trip as well. I heard about that.

Annette Keller 26:14

Yeah, I love it. Listen, like I said, he's, he's not destitute or anything. If you don't pay this claim out, he'll be okay. We'll get him another car. I'm just, he's just I just he's just i It's hard to explain his behavior. Yeah, you know, it's nothing that I can act on. Like he's not, it's nothing that I is, you know, can act on or take him to court over and take away his freedom or anything. It's, this is very difficult behavior. But he's, he's doing fine. He has money. This is not this has nothing to get for anybody to get upset over it. So he was saying you want his checking accounts, or

Speaker 3 27:09

so I shouldn't be discussing it because I haven't seen the power of attorney. But we're no longer going to need any of that information, because I'm just going to waive it.

Annette Keller 27:19

Okay, all right. Tom, please let me know if there's anything else I can do. And I will send these in as soon as I can get them printed out.

Speaker 3 27:27

Yeah. And so, um, just let him know, nothing to worry about, you know, this, you know, you talk to Geico and everything's all being taken care of so because I don't want to call him because I don't want to upset him more. So. But yeah, everything is fine. And what we'll do is I'm going to be closing my end, and he should be able to move forward Wednesday.

Annette Keller 27:50

Okay, thank you very much.

Speaker 3 27:52

No problem. Again. If you have any other questions, please feel free to give me a call. Leave me a voicemail in case I don't answer. Okay.

Annette Keller 27:58

All right. Thank you very much, Tiffany. Awesome. And I'm

Speaker 3 28:01

sorry. Sorry. What was your name again? I apologize. Annette Keller. Thank you so much, and I hope you have a better day. Oh, you too. Bye. Bye. Goodbye.

Transcribed by <https://otter.ai>

Exhibit D

April 27, 2023 email re: wiring money to cover Mr. Greco's purchase of car



Re: RE: Car purchase

From: "Annette Keller" <akeller@usa.com>
To: "Tim Mullen" <tmullen@qbuickgmc.com>
Date: Apr 27, 2023 5:29:11 PM

Hi Tim,

The wire transfers have been submitted. I'm unsure if they will go out tonight, because it's after 4:00 pm EST, but they should be there within 2-3 of business hours (which might be early tomorrow morning if not tonight).

Here is the information:

Wire Transfer from Fidelity for \$14,500.00 on 04/27/2023
Wire transaction number #69204929
For Anthony Greco's purchase of 2013 Buick Encore

Wire Transfer from Pentagon Federal Credit Union for \$500.00 on 04/27/2023
Wire confirmation #PFO230427440588
For Anthony Greco's purchase of 2013 Buick Encore

To Wells Fargo Bank, wire routing number 121000248, account number 5763227161.

Please let me know if there are any problems or concerns.

Thank you,

Annette Keller
301-661-2623

Sent: Thursday, April 27, 2023 at 4:02 PM
From: "Tim Mullen" <tmullen@qbuickgmc.com>
To: "'Annette Keller'" <akeller@usa.com>
Subject: RE: Car purchase

Annette, here you.

From: Annette Keller <akeller@usa.com>
Sent: Wednesday, April 26, 2023 9:57 AM
To: Tim Mullen <tmullen@qbuickgmc.com>
Subject: Re: Car purchase

Hi Tim,

My father's account doesn't have the insurance payout for his last car in it yet. He says that Geico put the check in the mail but he hasn't received it yet. There is as yet no refund of the hold/deposit on the travel trailer that my father was trying to buy last week. I will have to cover the entire cost of the car from the sale of stocks, which will take a couple of days to settle. However, I can wire the funds directly from Fidelity to your bank account below.

Can you provide me with a copy of the sales documents for the car or an invoice, along with the payment request for the wire transfer on your dealership's letterhead, stating the exact amount that you require? Also, I will ask that you return the check or allow me to put a stop on the check prior to wiring the money to you.

If you would like me to send you a copy of my power of attorney, I can do that.

Thank you,

Annette Keller

301-661-2623

Sent: Tuesday, April 25, 2023 at 5:43 PM
From: "Tim Mullen" <tmullen@gbuickgmc.com>
To: AKELLER@USA.COM
Subject: Car purchase

Annette, our bank is Wells Fargo. Our account number is 5763227161 and routing number is 121000248. Thanks, Tim

Exhibit E

October 9, 2022 voicemail admission Mr. Greco fails to sign/return informed consents

Audio may be downloaded from:

https://drive.google.com/drive/u/1/folders/1KOyYk_OVbrXmsOhGtjA1TmaDCEUznliA

Anthony Greco 0:01

Hi, this your father I was going through some piles of stuff I have on my desk that I put aside quite a while ago. And in it or they envelope addressed to me that you sent certified mail and the first thing on top is a letter dated December 9 2001. Regarding a written informed consent and agreement and you have a little note at the top say please review sign and return and self addressed envelope. It looks like you prepared quite a few things. Identity theft investigation insurance coverage in home housekeeping and cooking and personal assistance

then there's one stapled together saying regarding 12 December 2021. Phone call follow up informed consent to phone consent to opponent and again it says certified one. I don't remember this one it's in. Like I say it was sent to me from you. And it's sent certified mail and it looks like there's a lot being prepared for something I guess that it begins your cover letter it says in order to start taking over your household accounts manage the trust and support you in your office. I've included a set of documents for you to review and sign some of these require you just initial to acknowledge you have been informed that some issue some of them requested you initial to indicate your decision preferences and goes on another couple of charts or graphs. What do you lose I don't remember it shows that I opened I received it in in the mail and I opened it got I put it right back in the folder. And it got mixed in with some papers I I was holding for quite a long time on file. And I'm trying to clean up my desk from other things around here. And I came across this thing that you sent this package that you sent me sort of let's talk about it when you get his chance and explain it I never did sign off or initial things you sent. And I want you if it's important. Okay, that's all no worry. No rush. And finally another letter saying Dear Annette, it was decided to prepare a checklist of things for you to do and people in office.

Transcribed by <https://otter.ai>

Exhibit F

July 8, 2023 letter to AZ OMV Medical Review
Program about Mr. Greco's driving

July 8, 2023

Mail Drop 818Z
Medical Review Program
Motor Vehicle Division
P.O. Box 2100
Phoenix, AZ 850901-2100

VIA CERTIFIED MAIL

Re: Increasingly Unsafe Driving by Anthony Greco

I have power of attorney for my father, Anthony Greco. My father was diagnosed with early dementia and mild cognitive impairment in 2021. His condition has worsened significantly since then, and his behaviors have become more erratic and eccentric. On a visit to him on June 24-25, 2023, I saw that he had strapped a 5 gal can of gasoline in the passenger compartment of his car, and storing it there, where the car was sitting out in the sun for long periods of time and significant fumes were accumulating in the car. He was driving it around like this, with the windows up and the air conditioner on. He claims that he doesn't smell any gas fumes. He says he does this because he runs out of gas because he can't remember to keep putting gas in the tank. I'm concerned about the safety issue, but also about the role that the gasoline fumes may be playing in his apparent worsening cognitive function as gasoline fumes contain benzene, a neurotoxin. He has had multiple accidents in the past year and a half, which were very significant and related to inattentive or cognitive/motor confusion while driving. In 2021, when he last visited with a neurologist, Kathryn Bradley, she said he should not drive much and that he should limit his trips to 5 miles radius from his house. That was two years ago, his cognitive and physical condition has worsened since, and he has not maintained a relationship with Dr. Bradley or any other neurologist to follow and monitor his condition. He has failed to maintain consistent relationships with general practitioners and has fired one after the other. There is no one following his dementia status, his physical condition or health care on a consistent basis at this time.

During my June 24-25, 2023 visit, he refused to remove the gas can from his car. He used to work for AAA, reviewing hotels and restaurants, and knows that with an AAA membership, he can have someone bring him gas if he runs out. He can afford the membership. He states that it's okay to carry the gas because that's what people did during the Korean war (before there were gas stations everywhere).

Since my visit, I have spoken with the fire department, the sheriff's department, Saddlebroke (Golden Ranch) Fire Station's Community Response Team (CAP Team) and Adult Protective Services, and find there are no laws in Arizona to prohibit him from continuing to store and carry gasoline in his car. For this reason and for reasons related to the significant increase in his serious accidents due to mental or motor function confusion, and due to his having progressing dementia but not being in a consistent relationship with a doctor and his not being followed by any neurologist for the past 2 years as he worsens, I feel that for his safety and the safety of others, he should lose his driving privileges. I am including a copy of my father's power of attorney but I don't know for how long it will be valid. He has surely heard by now that I am seeking to have his driving privileges revoked and he may revoke my POA. If that is the case, he may finally (hopefully) remove the gas can from the car.

Sincerely,

Annette Keller

Images of accident vehicle and site from Buick Enclave speed control-related accident on December 6, 2021.

Anthony Greco
36959 S. Lambert Ln
Tucson, AZ 85739

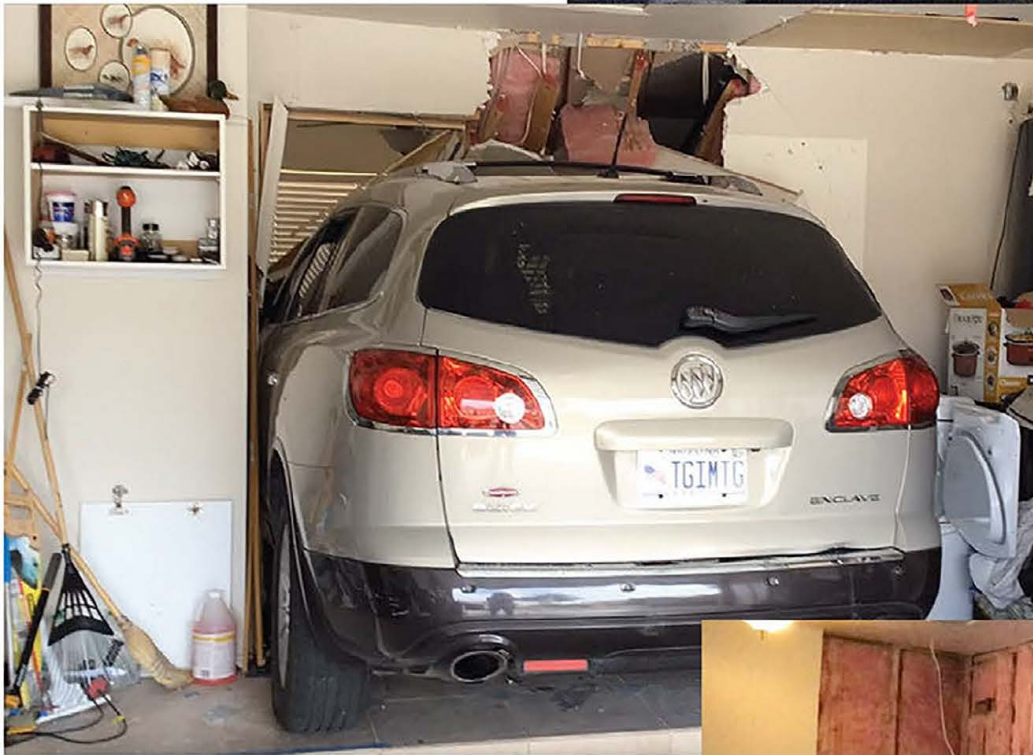


Exhibit G

June 17, 2024 Mr. Greco ltr to James Keller with threats,
extortion & defamation

Mr. James E. Keller
240 Whitmoor Terrace
Silver Spring, MD 20901

June 17, 2024

James:

Your wife said you visited us in NC but I don't remember meeting you. She did tell me that your family in New England is very religious and that you have a sister that's a nun. That's why I decided to warn you about what will happen if you and your wife fail to comply with instructions in this letter and the attached letter sent by my attorney.

Your wife signed a Revocable Living Trust on 5 November 2021 giving her authority to manage my life savings. That resulted from me being scammed in 2021. She has had control of my life savings for three years during which she did not provide any information about what she was doing with my life savings. I trusted her.

In 2013, however, she became verbally abusive and increasingly aggressive resulting in her last three visits ending prematurely. During one visit she told me that my life savings are being used to bring the MD house up to code by remodeling a bathroom, replacing windows, plumbing, etc. When asked why that was decided without my approval, she failed to answer. It then occurred to me that if she can afford to own two properties then perhaps the PA house was purchased with my life savings. I then decided to revoke her status as trustee for the Living Trust and removed her as sole beneficiary on my Will. She then retaliated by making my life difficult by sending letters to several AZ offices. For example, she sent a letter to the AZ DMV questioning my ability to drive safely due to my mental and physical decline. The DMV then decided to cancel my driver's license and auto insurance policy.

If you approve of your wife's decision to steal my life savings and fail to see to it that every dollar of my savings and 50 one ounce gold coins are returned to me by NLT 28 June 2024 I will initiate legal action against you and your wife. If it is decided to comply, send all files from investment firms and banks that had access to my savings for three years. My next letter will be sent to your employer if you fail to act. Tell your wife that I never want to see her again.

Sincerely,



Mr. A. A. Greco

Exhibit H

Slides listing Mr. Greco's false complaints against people who upset him, 2020-23

The slides exhibit, which is too large to email, may be viewed at anthonygreocoscomplaints.com

