



Wealth

Julie B. Lazar
Senior Vice President
Estate Advisor
Truist Bank

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P. O. Box 678
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December 31, 2025

The Fernbank Science Center
ATTN: Byron Scheuneman/Lauren Scott
156 Heaton Park DR
Atlanta, GA 30307

RE: **Estate of Gloria H. Waltemeyer**
Truist Bank, Executor

Gloria H. Waltemeyer Revocable Trust dated 4/17/2003 as
Amended on 1/25/2006, 5/4/2006 and 11/28/2012
Truist Bank, Trustee

Robert V. Waltemeyer Trust, as Amended
and Restated on August 16, 2000
Truist Bank, Trustee

Dear Beneficiary:

Thank you for your patience during the administration of the Gloria Waltemeyer Estate, the Gloria H. Waltemeyer Trust and the Robert V. Waltemeyer Trust. We are moving along nicely with the administration and would like to provide you an update.

706 Estate Tax Return

Mrs. Waltemeyer's gross **taxable** estate for IRS purposes include the Estate assets, Gloria's Interim Trust assets and Robert's Trust assets. Truist filed an extension for the 706 Estate Tax Return on 6/14/24 with a payment from the Robert V. Waltemeyer Trust of \$11,000,000. **The 706 Estate Tax Return was filed on 12/3/24 and we have received the refund of \$183,818.00. We will not have a final determination until the IRS has completed the review of the Estate Tax Return and issued an Estate Tax Closing Letter. We will not be able to make a principal distribution from the Robert Waltemeyer Charitable share B Trust until the IRS has completed its review of the Return and issued a Tax Closing Letter and the administration of Gloria's Estate and trusts is otherwise complete. In our experience it takes between 18-36 months from the time of filing to receive an IRS Closing Letter.**

Gloria H. Waltemeyer Estate, Truist Bank, Executor
Truist Account #799481

We have made final distributions from the Gloria H. Waltemeyer Estate to the Gloria H. Waltemeyer Interim Trust. The Estate is required to file an Accounting with the Pennsylvania Attorney General. Once the Attorney General has accepted the Accounting, we will close the estate.

Gloria H. Waltemeyer Interim Trust, Truist Bank, Trustee**Truist Account #1129084**

The Gloria Waltemeyer Interim Trust will remain open until the Estate Tax Closing Letter is received and the administration has been completed.

Robert V. Waltemeyer Trust, Truist Bank, Trustee

Robert V. Waltemeyer Trust account #1123793

Share B Charitable Share account #7997949

As I discussed in my last two update letters, the Robert V. Waltemeyer Trust agreement directs the Trustee to divide the Trust into two shares, the Family Share A and the Charitable Share B. As you are aware, we have opened and funded Share A and Share B from the Robert V. Waltemeyer Trust with the Coca-Cola stock. We reserved a small cash reserve in the main Robert V. Waltemeyer Trust account #1123793 for on-going expenses. You should be receiving statements from both the main Robert W. Waltemeyer Trust account #1123798 and the Share B Charitable Share account #7997949

DISTRIBUTIONS

Enclosed please find a check which represents your organization's share of accumulated income (interest and dividends). We will continue to make income distributions periodically during the administration. I anticipate accumulated distributions being made semi-annually.

Sincerely,

Julie B. Lazar

Julie B. Lazar, SVP
Senior Estate Advisor