

Richard Nixon Presidential Library
Contested Materials Collection
Folder List

<u>Box Number</u>	<u>Folder Number</u>	<u>Document Date</u>	<u>No Date</u>	<u>Subject</u>	<u>Document Type</u>	<u>Document Description</u>
53	36	9/8/1971	<input type="checkbox"/>	White House Staff	Memo	From Strachan to Haldeman RE: "President Nixon Memorabilia/White House Staff Wills" 1pg
53	36	9/8/1971	<input type="checkbox"/>	White House Staff	Memo	From Strachan to Haldeman RE: "President Nixon Memorabilia/White House Staff Wills" 1pg
53	36	6/26/1972	<input type="checkbox"/>	Personal	Memo	From Strachan to Ehrlichman RE: "President's Estate Plan" 1pg
53	36	6/26/1972	<input type="checkbox"/>	Personal	Memo	From Strachan to Ehrlichman RE: "President's Estate Plan" 1pg
53	36	5/26/1972	<input type="checkbox"/>	Personal	Letter	From John Alexander to Ehrlichman RE: President's Estate Plans 2pg

DOCUMENT WITHDRAWAL RECORD [NIXON PROJECT]

DOCUMENT NUMBER	DOCUMENT TYPE	SUBJECT/TITLE OR CORRESPONDENTS	DATE	RESTRICTION
N-1 [DOC # 90]	Memo	From Strachan to: Halde man, Re: President Nixon Memorabilia/White House Staff Wills	9/8/71	C
N-2 [DOC # 91]	Memo	From Strachan to: Ehrlichman, Re: President's Estate Plan"	6/26/71	G
N-3 [DOC # 92]	Memo	Letter From, Alexander to "John" Re: RN's estate Plan	5/23/73	C

FILE GROUP TITLE **STAFF SECRETARY** BOX NUMBER **126**

FOLDER TITLE **Papers Project [IV]**

RESTRICTION CODES

- | | |
|--|---|
| <p>A. Release would violate a Federal statute or Agency Policy.
 B. National security classified information.
 C. Pending or approved claim that release would violate an individual's rights.
 D. Release would constitute a clearly unwarranted invasion of privacy or a libel of a living person.</p> | <p>E. Release would disclose trade secrets or confidential commercial or financial information.
 F. Release would disclose investigatory information compiled for law enforcement purposes.
 G. Withdrawn and return private and personal material.
 H. Withdrawn and returned non-historical material.</p> |
|--|---|

Presidential Materials Review Board

Review on Contested Documents

Collection: Staff Secretary
Box Number: 126

Folder: Paper Project [IV]

<u>Document</u>	<u>Disposition</u>
90	Return Private/Personal
91	Return Private/Personal
92	Return Private/Personal

Ritzel/Kalmbach

U-1

THE WHITE HOUSE

WASHINGTON

Administratively Confidential

September 8, 1971

MEMORANDUM FOR:

H.R. HALDEMAN

FROM:

GORDON STRACHAN G

SUBJECT:

President Nixon Memorabilia/
White House Staff Wills

After you reviewed and forwarded my August 10 memorandum on the status of this project, I again contacted Richard Ritzel at Mudge Rose about the time frame for his preparation of the President's estate plan for review by you and John Dean. He indicated that the preliminary materials would be ready early next week.

A check with John Dean as to the status of his companion Presidential papers project, however, uncovered a serious problem. Dean had just talked with Herb Kalmbach in Hawaii. Kalmbach reported that when he met with the President in San Clemente (August 27) he and Rose Mary Woods were asked to review the President's personal matters and to have an estate plan ready in 90 days.

The question is whether your August 1 memorandum to John Dean indicating that the President "has absolute confidence in Ritzel . . . as being the top estate lawyer around . . ." and the one who should work toward resolving the "whole question of papers and his estates, etc." or whether Kalmbach, DeMarco is to have primary responsibility for preparation of the President's estate plan.

Recommendation:

Ritzel and Kalmbach should both prepare recommendations for review. Both should be advised of the other's assignment.

Approve _____ Disapprove _____

Comment _____

G → Dean 9/9 - will check De Marco + then G → K
G → Tannin + RSR 9/9 -

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Approve _____ Disapprove _____

Comment _____

GS1m

N-2

Huller

lt
FU
8/4

FK
6/28

7/8

~~7/5~~

Aug
8/8

ADMINISTRATIVELY CONFIDENTIAL

June 26, 1972

MEMORANDUM FOR:

JOHN EHRLICHMAN

FROM:

GORDON STRACHAN

SUBJECT:

President's Estate Plan

You asked me to call John Alexander to obtain the Mudge Rose draft documents of the President's Estate Plan. John Alexander was out of town and on John Dean's advice I talked with Dick Ritzel. I told Mr. Ritzel that we would like to have his draft documents and comments on DeMarco's materials by June 30. Mr. Ritzel was civil to me only because I was his Associate for two years.

In response to the substance of your request, Mr. Ritzel said he needs final word on the use of the papers for Mrs. Nixon's benefit upon the President's death. The question is whether all papers are to go to the irrevocable trust or whether she is to have a limited power to appoint the proceeds to issue. The DeMarco draft does not address itself to the question and instead gives her a general power of appointment to dispose of the papers in any way she sees fit.

Mr. Ritzel will prepare documents which implement the Mudge Rose plan and DeMarco's statement of what he hoped his documents would do. My own reading of the DeMarco documents confirms the lack of conformity between his statement and his documents. Mr. Ritzel will not redraft DeMarco's documents as the risk of error would be too great. He will begin work on the Mudge Rose documents immediately but would not commit to a date.

GS/jb Ritzel → E 7/29 - Sent materials to SF + to us on 8/4
8/7 - E + H - must meet Dean reviewing

ADMINISTRATIVELY CONFIDENTIAL

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GS/jb

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May 23, 1972

CONFIDENTIAL

Honorable John D. Ehrlichman
Assistant to the President
for Domestic Affairs
The White House
Washington, D. C.

Dear John:

I am sorry that we have had so much trouble getting together on the telephone. In view of the difficulty, it seems perhaps best to write you to let you know the points Dick Ritzel and I have wanted to take up with you. We are quite concerned over the recent developments regarding the President's estate plan. To recapitulate the recent history briefly:

As you will recall, there seemed to be some initial problem as to final responsibility for the development of a plan but this appeared to be put at rest from your remarks to us and from a telephone talk with the President shortly before Christmas in which he told Dick and me we had the ultimate responsibility for his estate plan. Shortly thereafter we submitted a plan based upon our best understanding of the President's wishes and, of course, pointing out questions that needed to be answered. Although we did not see the President on this plan, we were advised that as a result of a conference you and John Dean had with the President there should be a revision to represent the then views. Accordingly, such a revision was prepared and circulated to the interested parties.

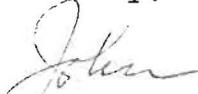
This was the plan on which Frank De Marco commented in his memorandum recommending some different proposals. His suggestions seemed to us so different from our understanding of what was desired that we were very much troubled as to whether we properly understood his memorandum, particularly since in the memorandum he expressed the view that there would be no estate tax on Mrs. Nixon's death, although the plan involved a transfer of property by her with a retained life estate. After a review of the entire situation and consideration of the various legal points and extensive discussions here, Dick Ritzel wrote Frank pointing out the problems raised by his memorandum and reiterating the view we held that, according to our information, the plan we had suggested met the President's wishes.

A few days later, Frank De Marco and John Dean telephoned on a conference phone from the White House regarding what appeared to be a conflict of views between Frank and us. It was, of course, disturbing to us that an extended conference had been held on the whole matter at the White House without our participation. During the course of the conversation it appeared rather clearly that there had been a misunderstanding of certain aspects. Furthermore, for the first time we learned that Frank De Marco had submitted a further revision which we have not yet seen, although Dick asked John Dean to send us a copy.

My purpose in writing this letter is to express considerable concern over what seems to be a lack of direction in the situation. Normally, if we are working with another law firm on a matter, our wish is to try to sit down together and reconcile views, if possible, and if not, at least to have a clear-cut difference of opinion on which all parties in interest can focus. I think it is most unfortunate in this case if a similar procedure cannot be adopted and it would be a most unhappy result if ultimately the President did not have a firm recommendation based upon his wishes. Frankly, at this moment we are somewhat in doubt as to what those wishes are, in view of the recent developments. Our suggestion is that a further conference on the whole subject be arranged to be held either in Washington or New York, and Dick and I shall be glad to adjust our schedules to try to arrange a mutually convenient time.

Dick joins me in sending best regards.

Sincerely,



John H. Alexander

JHA:fj