



TO: Plymouth District Library Board **DATE:** July 15, 2026
RE: 2nd Quarter Objective Review **FROM:** Shauna Anderson,
Director

GOAL 1: Foster connections between residents

OBJECTIVE 1: Host a series of community conversations and panel discussions on civic engagement to provide inclusive spaces for dialogue, helping residents connect across differences and deepen their sense of belonging within the community during a complicated political time.

IN PROGRESS: “Community Builder Circles” began meeting this summer, as a venue to support community collaboration and dialog. So far, momentum for this group is building, and we expect to continue this program throughout the fall. “The Cookie Vote” programming is also slated for the fall and is expected to bring together adults and kids alike for civic education.

GOAL 2: Enhance communication and information sharing

OBJECTIVE 2: Redesign the staff intranet to a format that is easier to update and maintain, improving internal communication, information access, and efficiency so that staff can more effectively serve the public.

COMPLETED: The Leadership Team launched the new Intranet for staff in March and continue to make updates to improve access to information across staff.

GOAL 3: Contribute to the character of our community

OBJECTIVE 3: Hold a grand opening celebration of the refreshed library building to showcase updated spaces, honor community investment, and celebrate the library as a central piece of Plymouth's identity and civic pride.

COMPLETED: We hosted our grand reopening celebration on June 10 and welcomed almost 3,000 people through our doors in a single day! The event included a putt-putt golf course, face painting, treats, and a ribbon cutting ceremony. The week following the event, the library averaged 1,400 patrons per day—over double our daily average for the past 5 summers.



TO: Plymouth District Library Board **DATE:** July 17, 2026
RE: Trust Agreement, Approval **FROM:** Shauna Anderson,
Director

Earlier this spring, I received a letter from attorney Michael Muma, alerting us to the library's inclusion as a recipient in the trust of William Gravelle. We were presented with a Release and Resolution drafted by Mr. Muma, which I ran by our attorneys to look over. We were encouraged to move forward with the information provided, and I bring this before you today to recommend the approval of Mr. Muma's Resolution, attached to this memo.

MICHAEL MUMA
ATTORNEY AND COUNSELOR
134 N. MAIN STREET
PLYMOUTH, MICHIGAN 48170

~~(734) 453-1076~~

FAX: (734) 453-1413

EMAIL: mumalaw@gmail.com

New Telephone: 743-383-2909

April 17, 2026

Ms. Shauna Anderson
Library Director
Plymouth District Library
223 South Main Street
Plymouth, Michigan 48170

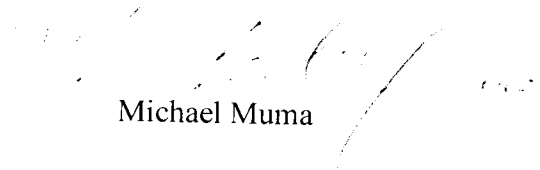
Re: Estate of William Gravelle, deceased

Dear Ms. Anderson:

As a follow up to my letter from last month, I have enclosed my final account as trustee of the William Gravelle Trust. As you will see, there has been very little financial activity in the interim. Together with the fiduciary accounting, I have enclosed my final attorney/fiduciary fee invoice (funds that would be paid from the trust), as well as a Release and a Resolution of Board of Directors. If you are satisfied with the accounting, please present the Resolution for approval by the library's board of directors, sign the Release, and return both to me. Upon receipt, I will then disburse the remaining balance of the trust to the library.

Naturally, if you have any questions or concerns, please let me know.

Sincerely yours,


Michael Muma

Case No. (N/A)

2. a. Balance on hand from last account, or value of inventory, if first account..... \$ 125,194.13
b. Enter Total Column 1, Income, Gain, and Other Receipts, from page 1 of this form..... \$ 3.53
c. **Subtotal** (Add line 2.a to line 2.b and enter the amount here)..... \$ 125,197.66
d. Enter Total Column 2, Expenses, Losses, and Other Disbursements, from page 1 of this form..... \$ 0.00
e. Balance of assets on hand (Subtract line 2.d from line 2.c and enter the amount here.)..... \$ 125,197.66
This line must equal the last line in item 3. (Itemize assets below.)

3. The balance of assets on hand are as follows:

ITEMIZED ASSETS REMAINING AT END OF ACCOUNTING PERIOD	
Citizens Bank (acct #...-653-1)	\$ 125,197.66
Total balance on hand. This line must equal the last line in item 2.	\$ 125,197.66

NOTE: In guardianships and conservatorships, except as provided by MCR 5.409(C)(4), you must present to the court copies of corresponding financial institution statements or you must file with the court a verification of funds on deposit, either of which must reflect the value of all liquid assets held by a financial institution dated within 30 days after the end of the accounting period.

4. The interested persons, addresses, and their representatives are identical to those appearing on the initial application/petition, except as follows: (For each person whose address changed, list the name and new address; attach separate sheet if necessary.)
5. This account lists all income and other receipts and expenses and other disbursements that have come to my knowledge.
6. ☒ This account is not being filed with the court.
7. ☐ My fiduciary fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$. Attached is a written description of the services performed.
8. ☒ Attorney fees incurred during this accounting period (including fees that have already been approved and/or paid for this accounting period) are \$ 2,870.00 . Attached is a written description of the services performed.

I declare under the penalties of perjury that this account has been examined by me and that its contents are true to the best of my information, knowledge, and belief.

Attorney signature
Michael Muma
Attorney name (type or print):
134 N. Main Street
Address
Plymouth MI 48170
City, state, zip
P 29808
Bar no.
734-383-2909
Telephone no.

04/17/2026
Date
Fiduciary signature
Michael Muma
Fiduciary name (type or print)
134 N. Main Street
Address
Plymouth MI 48170
City, state, zip
734-383-2909
Telephone no.

(For accounts that must be filed with the court.)

NOTICE TO INTERESTED PERSONS

1. You must bring to the court's attention any objection you have to this account. Except in guardianships and conservatorships, the court does not normally review the account without an objection.
2. You have the right to review proofs of income and disbursements at a time reasonably convenient to the fiduciary and yourself.
3. You may object to all or part of an accounting by filing a written objection with the court before the court allows the account. You must pay a \$20.00 filing fee to the court when you file the objection. (See MCR 5.310[C].)
4. If an objection is filed and is not otherwise resolved, the court will conduct a hearing on the objection.
5. You must serve the objection on the fiduciary or his/her attorney.

MICHAEL MUMA
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Estate of William Gravelle
c/o Michael Muma
134 N Main St
Plymouth, MI 48170

April 17, 2026
File No: 2224057
Statement No. 7423
Page: 1

Decedent's Estate

Fees

			Hours	
12/11/2024	MM	Telephone conv. with Janet Early re bank records; tel conv with Teri at assisted living home re the same	0.70	245.00
12/13/2024	MM	Pick up bank, etc, records from assisted living home on Six Mile Road	1.00	350.00
12/16/2024	MM	Review financial records; dictate re the same	1.20	420.00
12/19/2024	MM	Respond to inquiry from Norm Collins	0.40	140.00
01/08/2025	MM	Dictate re preparation of cert of trust (banking)	0.50	175.00
	DMK	Prepare Certification of Trust	0.60	72.00
01/09/2025	MM	Review & revise certification of trust; dictate re need for death cert for Edith Kay Gravelle	0.50	175.00
01/29/2025	MM	Outside meeting with Citizens Bank; apply for EIN	1.00	350.00
01/30/2025	MM	Outside meeting with manager at Citizens Bank to open trust account; order death cert for Kay Gravelle	1.50	525.00
02/14/2025	MM	Telephone conv. with Norm Collins	0.30	105.00
02/21/2025	DMK	Telephone conv. with Generations Funeral Home. Prepare Notice to Creditors; email same to Legal News for publication.	0.80	96.00
	MM	Dictate re claims notice and funeral bill	0.40	140.00
04/04/2025	DMK	Email to Norm Collins with copies of Will and Trust.	0.50	60.00
	MM	Office meeting with Norm Collins; call to Tim at Generations Funeral Home	1.00	350.00
04/15/2025	MM	Work on account; pay bills	0.80	280.00

Estate of William Gravelle

File No. 04/17/2026
Statement No. 2224057
7423

			Hours	
07/11/2025	MM	Arrange to publish for claims; forward claims notice to Detroit Legal News	1.00	350.00
02/10/2026	MM	Outside meeting with Soumi Sharma at Citizens Bank to close joint account (William & Edith) and transfer funds to trust account	1.20	420.00
02/11/2026	MM	Prepare inventory	0.50	175.00
02/12/2026	MM	Prepare First Annual Account of Fiduciary and 2025 forms 1041 and MI-1041	1.50	525.00
02/13/2026	MM	Finalize and file income tax returns; prep package of documents for delivery to beneficiary	0.50	175.00
03/04/2026	MM	Letter to Plymouth District Library	0.75	262.50
03/27/2026	MM	Draft Release and Resolution of Board of Directors	1.70	595.00
04/16/2026	MM	Draft Final Account of Fiduciary; review and revise Release	1.25	437.50
04/17/2026	MM	Letter to Shauna Anderson with Final Acct, atty/fiduciary fee invoice, Release, and Board Resolution	0.80	280.00
		For Current Services Rendered	20.40	6,703.00
<u>Advances</u>				
12/13/2024		Mileage - 16.2 miles @ \$0.67/mile		10.85
12/17/2024		Public Record (cost to obtain) - death cert from City of Livonia		16.00
01/30/2025		Public Record (cost to obtain) (death cert for Kay Gravelle)		34.00
08/28/2025		Publication (legal notice) - Detroit Legal News		116.95
		Total Advances		177.80
		Total Current Work		6,880.80
		Balance Due		<u>\$6,880.80</u>

RELEASE

In the matter of William Gravelle Trust dated June 12, 1992.

The undersigned, Shauna Anderson, Director of the Plymouth District Library, 133 S. Main Street, Plymouth, Michigan 48170, being a beneficiary of the William Gravelle Trust dated June 12, 1992, states as follows:

(1) That she is advised that the Plymouth District Library is a beneficiary of the William Gravelle Trust dated June 12, 1992.

(2) That she is advised that Michael Muma, Attorney at Law, 134 N. Main Street, Plymouth, Michigan 48170, is the successor trustee of the said trust.

(3) That she is further advised by the trustee that neither the Estate of William Gravelle nor the William Gravelle Trust dated June 12, 1992, are currently subject to probate court administration nor were either at any time previously.

(4) She acknowledges receipt of all of the following:

Last Will and Testament (dated 10/11/16);
Fourth Amendment to Trust (dated 10/12/18);
Third Amendment and Restatement of Trust (dated 10/11/16);
Date of death Inventory of Trust Assets (dated 2/10/26);
2025 Form 1041 (together with Michigan form MI-1041, both dated 2/12/26);
First Annual Account of Fiduciary (dated 2/12/26); and
Final Account of Fiduciary (dated 4/17/26).

(5) The First Annual Account of Fiduciary shows total receipts of \$1,548.82 and total disbursements of \$7,795.00, which included no attorney or fiduciary fees.

(6) The Final Account of Fiduciary shows receipts of \$3.53, total distributions of \$0.00, a total balance of assets remaining of \$125,197.66, and an outstanding invoice for attorney/fiduciary fees in the total amount \$6,880.80.

(7) She acknowledges that she has been afforded ample opportunity to review all of the above documents together with this Release.

(8) She acknowledges that she is signing this Release on behalf of the Plymouth District Library and has been duly authorized to do so by the governing board of the said institution.

(9) In consideration of distribution to the Plymouth District Library of the remaining balance of trust assets less outstanding attorney/fiduciary fees, the undersigned hereby forever irrevocably waives any right that the beneficiary might have to object to admission of the decedent's last will and testament to probate and further waives any objection that the said beneficiary might have with regard to the Inventory of Trust Assets dated 2/10/26, the First Annual Account of Fiduciary, and/or the Final Account of Fiduciary; the undersigned hereby stipulates on behalf of the said beneficiary that the court of competent jurisdiction shall accept and file this Release in lieu of some other waiver and consent to the foregoing including a petition for allowance of the said accounts.

(10) On behalf of the Plymouth District Library and in consideration of distribution to the said beneficiary of the remaining balance of trust assets less outstanding attorney/fiduciary fees, the undersigned hereby voluntarily releases, discharges, and holds harmless Michael Muma, individually and as trustee of the William Gravelle Trust dated June 12, 1992, from any and all liability whatsoever with regard to the collection, administration, and distribution of the above-described trust estate with regard to financial transactions occurring during and prior to the accounting periods described in the two accounts of fiduciary referenced above and with regard to any circumstances surrounding the making, drafting, execution, and funding of the trust by William Gravelle.

Signed on _____, 2026, by the undersigned.

Shauna Anderson, Director
Plymouth District Library

RESOLUTION OF BOARD OF DIRECTORS

The Board of Directors of the Plymouth District Library, 133 S. Main Street, Plymouth, Michigan 48170, hereby state and resolve as follows:

The Board of Directors of the Plymouth District Library convened a meeting for the purpose of reviewing a proposed Release presented by the William Gravelle Trust dated June 12, 1992, Michael Muma, Trustee.

The above-described meeting was duly called and convened pursuant to the by-laws of the said Plymouth District Library with a quorum present for the purpose of transacting such business as was presented for consideration.

The said meeting of the Board of Directors was convened on _____.

Upon motion duly made and seconded, it was:

RESOLVED that execution of the Release presented by the William Gravelle Trust dated June 12, 1992, together with the documents cited therein, on behalf of the Plymouth District Library is hereby determined to be in the best interest of the Plymouth District Library.

FURTHER RESOLVED that Shauna Anderson is hereby authorized to execute the said Release presented by the William Gravelle Trust dated June 12, 1992, on behalf of the Plymouth District Library.

Signed and sealed this _____ day of _____, 2026, by the undersigned.

(signature)

(printed name)

Secretary of the Plymouth District Library