

Kimberly Moran

From: Pam Simon [pambsimon@me.com]
Sent: Monday, April 29, 2013 10:31 AM
To: Ted Bernstein
Cc: Donald Tescher; David (Scooter) Simon; Robert Spallina; Kimberly Moran
Subject: Re: Bernstein Grandchildren's Trusts

Also asking trust id# - thanks

On Apr 29, 2013, at 8:32 AM, Ted Bernstein <tbernstein@lifeinsuranceconcepts.com> wrote:

> Thanks Don - banks are asking for copy of trust. Is what you provided here enough to open accounts? I am in jury duty today with limited access to phone and email.

>
> Ted Bernstein
> 561-988-8984
> tbernstein@lifeinsuranceconcepts.com

> On Apr 29, 2013, at 8:15 AM, "Donald Tescher" <dtescher@tescherspallina.com> wrote:

>> Attached is an executed copy of Simon's Revocable Trust dated July 25, 2012. The relevant provisions are Article II. B. and C. which identify the beneficiaries and the manner in which their shares are to be administered, and Article IV. C.2.a. on page 16 which discusses the trustees for the grandchildren's trusts. Ted, please forward this to your siblings and advise them that they need to open a bank or brokerage account in the name of the trust for each child. The accounts will be titled: "(name of parent-trustee), Trustee F/B/O (name of child) under the Simon L. Bernstein Trust dated 7/25/2012"

>> We are in the process of assigning tax ID numbers for each of the 10 trusts. We will use the addresses for each of the parent-trustees. Once we have the numbers assembled, we will forward them to you.

>>
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