

Donald Tescher

From: Donald Tescher
Sent: Wednesday, April 24, 2013 10:16 AM
To: 'Ted Bernstein'
Cc: Robert Spallina
Subject: RE: Bernstein Grandchildren's Trusts Under Simon Bernstein Revocable Trust

Ted:

We will need each grandchild's full name and date of birth. Each parent (you and your siblings) will be the trustee of their child's trust. At age 25 the child becomes a co-trustee. Each of the trusts will be assigned a tax ID number. You all can individually decide where you wish to open any bank or brokerage accounts. All of the provisions for these trusts are spelled out in Simon's Trust document. As trustees, you each have fiduciary duties and responsibilities to your beneficiary-child.

Unless separately engaged by us, we do not represent the grandchildren or their trustee-parent with respect to these trusts. At the conclusion of Simon's estate administration, Robert and I as the personal representatives and trustees will cause the remaining assets of his estate and trust to be distributed to these trusts.

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From: Ted Bernstein [mailto:tbernstein@lifeinsuranceconcepts.com]
Sent: Wednesday, April 24, 2013 9:11 AM
To: Donald Tescher
Subject: Re: Bernstein Grandchildren's Trusts Under Simon Bernstein Revocable Trust

Don - I will call you today. None of the grandchildren are 25 yet.

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

On Apr 23, 2013, at 4:09 PM, "Donald Tescher" <dtescher@tescherspallina.com> wrote:

*Call sent
 crisis
 appeared
 Done
 4/24/13
 D*

4/24/2013

TS004653