

Donald Tescher

From: Ted Bernstein [tbernstein@lifeinsuranceconcepts.com]
Sent: Saturday, April 27, 2013 3:07 PM
To: Donald Tescher; Pam Simon
Subject: RE: Bernstein Grandchildren's Trusts Under Simon Bernstein Revocable Trust

Once the trust accounts are open at the bank you are using, the money can be wired right after you send me account info.

From: Donald Tescher [mailto:dtescher@tescherspallina.com]
Sent: Saturday, April 27, 2013 2:00 PM
To: Pam Simon
Cc: Ted Bernstein
Subject: Re: Bernstein Grandchildren's Trusts Under Simon Bernstein Revocable Trust

Yes, when I get in on Monday I will email out a PDF copy of the trust. As to funding, speak to Ted as the only funding that may take place now is coming from Shirley's trust that, based on the exercise of the power of appointment, is to be added to these trusts.

Sent from my iPhone
Donald R Tescher, Esq.
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4855 Technology Way
suite 720
Boca Raton, FL 33431
561-997-7008
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On Apr 27, 2013, at 1:45 PM, "Pam Simon" <pambsimon@me.com> wrote:

Can we get a copy of Simon's trust and molly's tax id #? also, how long between opening the account and wiring the money/

On Apr 27, 2013, at 10:54 AM, Donald Tescher <dtescher@tescherspallina.com> wrote:

Give them a copy of Simon's trust. If they have any questions, you can refer them to me.

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On Apr 27, 2013, at 11:39 AM, "David (Scooter) Simon" <dsimon@stpcorp.com> wrote:

Will do but bank wants copy of trust

On Apr 27, 2013, at 10:32 AM, "Donald Tescher"
<dtescher@tescherspallina.com> wrote:

Pam: you need to open a banking or brokerage account in your name as trustee of the trust for the benefit under your father's trust. We can provide a tax ID number. Any distribution to the trust from Shirley's trust will come from Ted who is the trustee of that trust.

4/28/2013

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