

Christine P. Yates Direct Dial: 954.760.4916 Email: cty@trippscott.com

November 9, 2012

Via E-Mail and U.S. Mail

Robert L. Spallina, Esq. Tescher & Spallina, P.A. 4855 Technology Way Suite 720 Boca Raton, FL 33431

Re: **Estates of Shirley Bernstein and Simon Leon Bernstein**

Dear Mr. Spallina:

Our firm represents Mr. and Mrs. Bernstein, individually, as natural guardians of Joshua, Jacob, and Daniel Bernstein, and as Trustees of any trusts created for Joshua, Jacob and Daniel Bernstein by Simon and/or Shirley Bernstein. In order to assist us in this matter, please provide us with copies of the following:

- 1. Copies of all estate planning documents including all Wills and Trusts for Shirley Bernstein and Simon Leon Bernstein that our client was a beneficiary, whether qualified or contingent;
- 2. Copies of all estate planning documents including all Wills and Trusts that our client's children, Joshua, Jacob and/or Daniel, are named as beneficiary, whether qualified or contingent;
- Copies of all documents executed in May and June 2012 regarding the Last Will and 3. Testament of Shirley Bernstein;
- Estate Accounting for Shirley Bernstein; 4.
- Estate Accounting for Simon Bernstein; 5.
- Trust Accountings for any Trusts that our client, his spouse, or his children are a 6. beneficiary, whether qualified or contingent;
- 7. Copies of any claims filed in the Estate of Shirley Bernstein and Simon Bernstein;
- Copy of the Inventory filed in the Estate of Shirley Bernstein; 8.
- Copy of the Inventory filed in the Estate of Simon Bernstein, or if none, please provide the 9. approximate date you expect the Inventory will be prepared and filed with the Probate Court;
- 10. Allocation of the tangible personal property of Shirley and Simon Bernstein. Specifically, is the jewelry being divided among the ten grandchildren?;
- Appraisals of tangible personal property, specifically the jewelry, artwork and collectibles; 11.
- 12. All documents relating to the life insurance policies owned by Shirley and/or Simon, insuring Shirley and/or Simon's life, or for the benefit of Shirley and/or Simon Bernstein;
- Please provide documentation concerning the allocation and division of all companies 13. owned by Simon and/or Shirley at the time of their deaths and copies of any partnership, 110 Southeast Sixth Street, Fifteenth Floor • Fort Lauderdale, Florida 33301

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Robert L. Spallina, Esq. November 9, 2012 Page 2 of 2

operating, or stockholders agreements;

- Please provide a status of the ongoing litigation involving Stanford; 14.
- Please provide a status of the Iliewit company stock. Were the issues with Gerald Lewin 15. resolved?:
- Please provide a status of the funding of Telenet Company and Candice's employment 16. with Telenet: and
- Please provide any information you have with regards to the college funds created by 17. Simon or Shirley Bernstein for the benefit of Joshua, Jacob and/or Daniel.

Thank you for your attention to this matter. Should you have any questions, please feel free to contact my office.

Very truly yours,

Christine P. Yates

For the Firm

CPY/jcj Eliot Bernstein cc: Marc Garber

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