

Friday, May 3, 2013

Reassure America Life Insurance Company  
J. L. McDonald, ALHC LTCP  
Vice President  
12750 Merit Drive  
Suite 600  
Dallas, TX 75251  
Telephone (972) 776-8535  
Fax (260) 435-8773

RE: URGENT RE Policy #1009208

Dear Mr. McDonald,

I, Eliot I. Bernstein, son of Simon L. Bernstein, and my children have been notified that we are possible beneficiaries of the life insurance policy on my deceased father. I am in receipt of your attached letter and I have retained counsel, Christine Yates at Tripp Scott in FL, for my children's interests in the policy and am currently seeking counsel regarding my interest in the policy and request that you send me and Yates a copy of the policy and all pertinent policy information immediately at the addresses below.

I have been told by the estate planning attorney, Robert Spallina, that he does not have a copy of the policy, schedules, riders, loans, attachments, etc. and that he is also missing a trust document that may have been the beneficiary. I am requesting that your company make NO distribution of any policy proceeds without both my written personal consent and my children's counsel consent, to any party. I am aware of claims that there is also a missing trust of Simon that may have been a Beneficiary and any information you maintain regarding the beneficiaries would be helpful in trying to establish who the rightful beneficiaries are. I, nor my children have consented to any agreements for distribution and have no proper paperwork to rely on.

I have been informed that parties are attempting to make distribution without my or my children's counsel knowledge and consent.

Please contact me at your earliest convenience so that we may discuss this further or you can write or email at my addresses below.

Address information for Christine Yates,

Christine P. Yates  
Tripp Scott  
110 Southeast 6 Street  
Fort Lauderdale, FL 33301  
(954) 525-7500  
[CTY@trippscott.com](mailto:CTY@trippscott.com)

Thank you for your cooperation in these matters,



Eliot I. Bernstein  
Inventor  
2753 N.W. 34th St.  
Boca Raton, Florida 33434-3459  
(561) 245.8588 (o)  
(561) 886.7628 (c)  
(561) 245-8644 (f)  
[iviewit@iviewit.tv](mailto:iviewit@iviewit.tv)

JAN. 8. 2013 10:13AM

NO. 603 P. 1

**Reassure America Life  
Insurance Company****J. L. McDonald, ALHC, LTCP  
Vice President**12750 Merit Drive  
Suite 500  
Dallas, TX 75251Telephone (972) 776-8535  
Fax (260) 435-8773**January 8, 2013****Mr. Robert Spallina  
Attorney at Law  
Teschler & Spallina, P.A.  
Boca Village Corporate Center I  
4855 Technology Way, Suite 720  
Boca Raton, FL 33431****Re: Simon Bernstein, Dec's  
Policy # 1009208****Dear Mr. Spallina:**

This will acknowledge your letters the most recent of which is dated December 21, 2012.

In as much as the above policy provides a large death benefit in excess of \$1.6 million dollars and the fact that the trust document cannot be located, we respectfully request a court order to enable us to process the claim.

Please let us know how we may assist you in this process.

Sincerely,

**Jim McDonald, ALHC, LTCP  
Vice President  
Claims Oversight**

# FAX

To: Robert Spallina  
Company:  
Fax: 915619977308

From: Kellie Walker  
Phone:

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**NOTES:**

Insured Simon Bernstein #1009208

**CONFIDENTIALITY**

This fax and any attachments are confidential and may also be privileged. If you are not the named recipient, or have otherwise received this communication in error, please notify the sender immediately, and do not disclose its contents to any other person, use them for any purpose, or store or copy them in any medium. Thank you for your cooperation.

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Date and time of transmission: Tuesday, January 15, 2013 11:49:30 AM

Number of pages including this cover sheet: 02

Last Transaction

Date	Time	Type	Station ID	Duration	Pages	Result
				Digital Fax		
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