From:	Eliot Ivan Bernstein
To:	"Ted Bernstein"; "Pam Simon"; "Jill Iantoni"
Cc:	"lisa.friedstein@gmail.com"; "iviewit@iviewit.tv"; Robert L. Spallina, Esq. ~ Attorney at Law @ Tescher & Spallina, P.A. (rspallina@tescherspallina.com)
Bcc:	"Caroline Prochotska Rogers, Esquire (caroline@cprogers.com)"; Michele M. Mulrooney ~ Partner @ Venable LLP (mmulrooney@Venable.com); "Marc R. Garber"; "Garber, Marc"; Marc R. Garber Esq. (marcrgarber@gmail.com); Andrew Dietz @ Rock-It Cargo USA, Inc. (andyd@rockitcargo.com); Christine P. Yates ~ Director @ Tripp Scott (CTY@trippscott.com)
Subject:	RE: Life Insurance - agreement
Date:	Thursday, December 6, 2012 6:02:48 PM

Ted, as you know I have none of the documents, policies, trusts, etc. regarding the life policy(ies) in question. My attorneys have requested Robert to send them the documents, all of them relevant to me and my children, including the policies and trust agreements they were in etc. and it is in their hands at this point. I am waiting to hear from them but this may take several weeks or more based on Robert's refusal to talk with counsel and then some time to get our hands around the documents that we are still waiting for Robert to send since May 2011 meeting and on. Also, being a trustee of the kids trusts I would not want to make any decisions while they are represented by counsel that could interfere, as receiving the benefit directly would put me in conflict of interest with their estates as trustee I believe, again, why I hired counsel and think you should too and with fiduciary liabilities as one of the three executors of the estate you may even have another level of conflict that you should probably check with counsel regarding. Thanks, Eliot

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From: Ted Bernstein [mailto:tbernstein@lifeinsuranceconcepts.com]
Sent: Thursday, December 06, 2012 5:50 PM
To: 'Eliot Ivan Bernstein'; 'Pam Simon'; 'Jill Iantoni'
Cc: lisa.friedstein@gmail.com; iviewit@iviewit.tv
Subject: RE: Life Insurance - agreement

Hi Eliot > probably the best thing to do is to forward the document to the counsel you retained, if you have not done so already. This should be fairly simple and straightforward for them to review. Speak to you soon…

From: Eliot Ivan Bernstein [mailto:iviewit@gmail.com]
Sent: Thursday, December 06, 2012 2:57 PM
To: Ted Bernstein; 'Pam Simon'; 'Jill Iantoni'
Cc: lisa.friedstein@gmail.com; iviewit@iviewit.tv
Subject: RE: Life Insurance - agreement

Thanks Ted, I and my counsel have his address and phone and stuff but he is refusing to talk to my and my children's attorneys who have already contacted him for information. Since I and the children are represented by counsel at this point he will need to deal with them regarding all these matters so I am not sure how anything can transpire while he refuses to release documents or meet with counsel, as I mentioned he told them already that he did not know me or my children first and then scheduled a meeting and cancelled and refuses to reschedule. Not sure what is up but I would be careful as Executor of any transactions that have not first gone through our counsel in any regard to any assets, etc. until these things are resolved. Let me know. eb

From: Ted Bernstein [mailto:tbernstein@lifeinsuranceconcepts.com]
Sent: Thursday, December 06, 2012 1:38 PM

To: 'Pam Simon'; Jill Iantoni
Cc: lisa.friedstein@gmail.com; iviewit@gmail.com; iviewit@iviewit.tv
Subject: RE: Life Insurance - agreement

Hi > his address is:

TESCHER & SPALLINA, P.A.
Boca Village
Corporate Center I
4855 Technology Way
Suite 720
Boca Raton, Florida 33431

From: Pam Simon [mailto:psimon@stpcorp.com]
Sent: Thursday, December 06, 2012 10:52 AM
To: Jill Iantoni
Cc: Ted Bernstein; lisa.friedstein@gmail.com; iviewit@gmail.com; iviewit@iviewit.tv
Subject: Re: Life Insurance - agreement

Thanks theo - will email u signed one today and fed x spallina - do u have his address?

On Dec 6, 2012, at 10:00 AM, "Jill Iantoni" <jilliantoni@gmail.com> wrote:

> Great. Thanks Ted for handling this!!
> Jill
> On Thu, Dec 6, 2012 at 8:58 AM, Ted Bernstein
> <tbernstein@lifeinsuranceconcepts.com> wrote:
> Hello,
>
> Good news; the Heritage Union Life Insurance company is ready to make payment on the policy that insured Dad. There was an exhaustive search for the original trust document from 1995, which is the beneficiary of the policy owned by Dad. Since we have not been able to locate it, the attached agreement will permit the insurance company to make payment to a Trust account that will then distribute the proceeds in equal parts to the 5 of us. Robert Spallina recommended that I distribute this document so it can be reviewed by each of you, signed and then it can be submitted to the carrier. Please sign the document where applicable. Then email to me the signature page and Fedex the original to Robert Spallina's office. Once we have all signatures, the carrier should release proceeds quickly.
>
> TESCHER & SPALLINA, P.A.
> Boca Village
> Corporate Center I
> 4855 Technology Way
> Suite 720
> Boca Raton, Florida 33431

Call me with any questions.

Ted

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<image001.jpg>
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