

IN THE UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT COURT ILLINOIS
EASTERN DIVISION

SIMON BERNSTEIN IRREVOCABLE)
INSURANCE TRUST DTD 6/21/95,)

Plaintiff,)

v.)

HERITAGE UNION LIFE INSURANCE)
COMPANY,)

Defendant.)

-----)
HERITAGE UNION LIFE INSURANCE)
COMPANY,)

Counter-Plaintiff,)

v.)

SIMON BERNSTEIN IRREVOCABLE)
INSURANCE TRUST DTD 6/21/95,)

Counter-Defendant,)

and,)

FIRST ARLINGTON NATIONAL)
BANK, as Trustee of S.B. Lexington,)
Inc. Employee Death Benefit Trust,)
UNITED BANK OF ILLINOIS, BANK)
OF AMERICA, successor in interest to)
LaSalle National Trust, N.A.,)
SIMON BERNSTEIN TRUST, N. A.,)
TED BERNSTEIN, individually and)
as alleged Trustee of the Simon)
Bernstein Irrevocable Insurance Trust)
Dtd. 6/21/95, and ELIOT BERNSTEIN,)

Third-Party Defendants.)
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Case No. 13-cv-03643

Honorable Amy J. St. Eve
Magistrate Mary M. Rowland



ELIOT IVAN BERNSTEIN,)
)
Cross-Plaintiff,)
)
v.)
)
TED BERNSTEIN individually and)
as alleged Trustee of the Simon)
Bernstein Irrevocable Insurance Trust)
Dtd. 6/21/95)
)
Cross-Defendant)
)
and)
)
PAMELA B. SIMON, DAVID B. SIMON)
both Professionally and Personally,)
ADAM SIMON both Professionally and)
Personally, THE SIMON LAW FIRM,)
TESCHER & SPALLINA, P.A.,)
DONALD TESCHER both Professionally))
and Personally, ROBERT SPALLINA)
both Professionally and Personally,)
LISA FRIEDSTEIN, JILL IANTONI,)
S.B. LEXINGTON, INC. EMPLOYEE)
DEATH BENEFIT TRUST, S.T.P.)
ENTERPRISES, INC.,)
S.B. LEXINGTON, INC., NATIONAL)
SERVICE ASSOCIATION, INC.)
(OF FLORIDA) NATIONAL)
SERVICE ASSOCIATION, INC.)
(OF ILLINOIS) AND)
JOHN AND JANE DOE'S)
)
Third Party Defendants.)

POTENTIAL BENEFICIARIES¹:

¹ Parents act as beneficiary Trustees in the estate of Simon L. Bernstein to their children, where Simon's estate may be the ultimate beneficiary of the policy and their children named below would be the ultimate beneficiaries of the policy proceeds. The failure of the grandchildren to be represented in these matters and listed as potential beneficiaries is due to an absolute conflict with their parents who are trying to get the benefits paid to them directly. This is gross violations of fiduciary duties and may be viewed as criminal in certain aspects as the lawsuit attempts to convert the benefits from the grandchildren to 4/5 of the children of SIMON by failing to inform their children (some minors) or have them represented in these matters. The Court should take Judicial Notice of this,

**JOSHUA ENNIO ZANDER BERNSTEIN
(ELIOT MINOR CHILD);
JACOB NOAH ARCHIE BERNSTEIN
(ELIOT MINOR CHILD);
DANIEL ELIJSHA ABE OTTOMO
BERNSTEIN (ELIOT MINOR CHILD);
ALEXANDRA BERNSTEIN (TED
ADULT CHILD);
ERIC BERNSTEIN (TED ADULT
CHILD);
MICHAEL BERNSTEIN (TED ADULT
CHILD);
MATTHEW LOGAN (TED'S SPOUSE
ADULT CHILD);
MOLLY NORAH SIMON (PAMELA
ADULT CHILD);
JULIA IANTONI – JILL MINOR CHILD;
MAX FRIEDSTEIN – LISA MINOR
CHILD;
CARLY FRIEDSTEIN – LISA MINOR
CHILD;**

INTERESTED PARTIES:

**DETECTIVE RYAN W. MILLER –
PALM BEACH COUNTY SHERIFF
OFFICE;
ERIN TUPPER - FLORIDA GOVERNOR
OFFICE NOTARY EDUCATION - THE
OFFICE OF THE GOVERNOR OF
FLORIDA RICK SCOTT**

NOTICE OF MOTION

**TO: SIMON BERNSTEIN IRREVOCABLE INSURANCE TRUST DTD 6/21/95,
HERITAGE UNION LIFE INSURANCE COMPANY, FIRST ARLINGTON NATIONAL
BANK, UNITED BANK OF ILLINOIS, BANK OF AMERICA, LaSalle National Trust,
N.A., SIMON BERNSTEIN TRUST, N. A., TED BERNSTEIN, PAMELA B. SIMON,
DAVID B. SIMON, ADAM SIMON, THE SIMON LAW FIRM, TESCHER &
SPALLINA, P.A., DONALD TESCHER, ROBERT SPALLINA, LISA FRIEDSTEIN,
JILL IANTONI, S.B. LEXINGTON, INC. EMPLOYEE DEATH BENEFIT TRUST,**

especially in the interests of the minor grandchildren who may lose their benefits if the proceeds of the insurance policy are converted to the knowingly wrong parties.



S.T.P. ENTERPRISES, INC., S.B. LEXINGTON, INC., NATIONAL SERVICE ASSOCIATION, INC. (OF FLORIDA), NATIONAL SERVICE ASSOCIATION, INC. (OF ILLINOIS), JOSHUA ENNIO ZANDER BERNSTEIN (ELIOT MINOR CHILD); JACOB NOAH ARCHIE BERNSTEIN (ELIOT MINOR CHILD); DANIEL ELIJSHA ABE OTTOMO BERNSTEIN (ELIOT MINOR CHILD); ALEXANDRA BERNSTEIN (TED ADULT CHILD); ERIC BERNSTEIN (TED ADULT CHILD); MICHAEL BERNSTEIN (TED ADULT CHILD); MATTHEW LOGAN (TED'S SPOUSE ADULT CHILD); MOLLY NORAH SIMON (PAMELA ADULT CHILD); JULIA IANTONI – JILL MINOR CHILD; MAX FRIEDSTEIN – LISA MINOR CHILD; CARLY FRIEDSTEIN – LISA MINOR CHILD;

PLEASE TAKE NOTICE that on Monday January 6 at 8:30am, or as soon thereafter as I may be heard, I shall appear before the Honorable Judge Amy J. St. Eve or any judge sitting in his or her stead in **Courtroom via Telephone** of the U.S. District Court of the Northern District of Illinois, Eastern Division, 219 South Dearborn St., Chicago, Illinois and shall present **the following motion attached hereto:**

CERTIFICATE OF SERVICE

I hereby certify that on December 20, 2013, I provided service to the person or persons listed above by the following means: ECF and EMAIL

Signature: Eliot Bernstein

Date: December 20, 2013

Name (Print): Eliot Ivan Bernstein

Address: 2753 NW 34th St.
Boca Raton, FL 33434

Phone: (561) 245-8588