# IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT IN AND FOR PALM BEACH COUNTY , FLORIDA 

CASE NO.: 502012CP004391XXXXSB

IN RE:

ESTATE OF SIMON L. BERNSTEIN, Deceased.

ELIOT IVAN BERNSTEIN, PRO SE

Petitioner(s),

VS.

TESCHER \& SPALLINA, P.A., (and all parties associated and of counsel); ROBERT L. SPALLINA (both personally and professionally); DONALD R. TESCHER (both personally and professionally); THEODORE STUART BERNSTEIN (as alleged personal representative, trustee, successor trustee) (both personally and professionally); et al.,

Respondent (s) .

EXCERPT OF PROCEEDINGS BEFORE

HONORABLE MARTIN COLIN

DATE: June 12, 2014

TIME: 9:50 a.m. - 10:35 a.m.

|  | 2 |  |  | 4 |
| :---: | :---: | :---: | :---: | :---: |
| 1 | APPEARING ON BEHALF OF WILLIAM E. | 1 | know, fulfill his duties and not run afoul of |  |
|  | STANSBURY: | 2 | Eliot, but we've got two or three more petitions. |  |
| 2 | PETER M. FEAMAN, P.A. <br> 3615 W. BOYNTON BEACH BOULEVARD | 3 | And the fees, I think, so far, approaching \$50,000 |  |
| 3 | BOYNTON BEACH, FL 33436 | 4 | for the curator. |  |
|  | By: PETER M. FEAMAN, ESQ. | 5 | THE COURT: Well, the way it works is pretty |  |
| 4 |  | 6 | simple. I mean, you know, if Mr. Brown is getting |  |
| 6 | APPEARING ON BEHALF OF TED BERNSTEIN: <br> PAGE, MRACHEK, FITZGERALD ROSE | 7 | bombarded by a party, and, you know, I mean, he's |  |
|  | KONOPKA \& DOW, P.A. | 8 | concerned that it may not be necessary and |  |
| 7 | 505 SOUTH FLAGLER DRIVE, SUITE 600 WEST PALM BEACH, FL 33401 | 9 | reasonable, then he, you know, he deals with that |  |
| 8 | By: ALAN B. ROSE, ESQ. | 10 | and causes himself not to have wasted time, but he |  |
| 9 | MATWICZYK \& BROWN | 11 | knows how to handle that. |  |
|  | 625 N. FLALGER DRIVE, SUITE 401 | 12 | MR. ROSE: We have no objection to Mr. Brown. |  |
| 10 | WEST PALM BEACH, FL 33401 <br> By: BENJAMIN P. BROWN, ESQ. (CURATOR) | 13 | It's not his -- the issue is not really with him, |  |
| 11 | By. BENJAMIN. BROWN, ESQ. (CURATOR) | 14 | but I think the curator needs some protection from |  |
| 12 | JOHN P. MORRISSEY, ESQ. | 15 | constantly being bombarded -- |  |
|  | 330 CLEMATIS STREET, SUITE 213 | 16 | THE COURT: He can protect himself. |  |
| 13 | WEST PALM BEACH, FL 33401 | 17 | MR. ELLIOT BERNSTEIN: Are you his attorney |  |
| 14 15 | ELIOT I. BERNSTEIN, Pro se | 18 | too? |  |
| 16 |  | 19 | THE COURT: Eliot, no, no. Don't do that. |  |
| 17 | BE IT REMEMBERED, that the following | 20 | MR. BROWN: Actually, Judge, this kind of |  |
| $\begin{aligned} & 18 \\ & 19 \end{aligned}$ | proceedings were taken in the above-styled cause before the Honorable MARTIN COLIN, at the Palm Beach County | 21 | dovetails into what happened on February 23rd. I |  |
| 20 | Courthouse, 200 West Atlantic Avenue, Room 8, in the City | 22 | did have the two motions for instruction, one of |  |
| 21 | of Delray Beach, County of Palm Beach, State of Florida, | 23 | them was when Eliot asked me -- |  |
| 22 | on June 12, 2014, to wit: | 24 | MR. FEAMAN: May 23rd. |  |
| 23 24 |  | 25 | MR. BROWN: May 23rd. Asked me to look into |  |
| 25 |  |  |  |  |
|  | 3 |  |  | 5 |
| 1 | P-R-O-C-E-E-D-I-N-G-S | 1 | 44 different subcategories of documents and kind |  |
| 2 | **** | 2 | of take the lead on objecting to the Tescher |  |
| 3 | THE COURT: Okay. All right. What's next? | 3 | Spallina accounting. The other one is with regard |  |
| 4 | Now, we're going to the other estate. | 4 | to the will, the 2012 will. And I have the pages |  |
| 5 | MR. BROWN: Simon. I have a second petition | 5 | of the transcript of what Your Honor said. And, |  |
| 6 | for payment of curator's fees, and this would be | 6 | essentially, I said it's not the curator's role to |  |
| 7 | for April. | 7 | take the lead on objecting to the accounting. |  |
| 8 | I don't know if there is any objection. | 8 | It's not the curator's role to -- |  |
| 9 | THE COURT: Any objection? | 9 | THE COURT: Hold on one second. |  |
| 10 | MR. BROWN: The order is substantially | 10 | MR. BROWN: It's not the curator's role to |  |
| 11 | similar to the first one, just changes the | 11 | challenge or even investigate the circumstances of |  |
| 12 | numbers. | 12 | the 2012 will. Your Honor -- |  |
| 13 | THE COURT: Okay. | 13 | THE COURT: You know, but here's the thing, |  |
| 14 | MR. ROSE: May I be heard on his petition? | 14 | if I said that and you then are being asked to do |  |
| 15 | THE COURT: Yeah. | 15 | something that you don't think is within the scope |  |
| 16 | MR. ROSE: We have no objection to his fees, | 16 | of the curatorship, then you make a decision based |  |
| 17 | but I do think it's important to point out to the | 17 | upon that. |  |
| 18 | court -- and it's going to be related to the next | 18 | MR. BROWN: Well, Your Honor, sometimes it's |  |
| 19 | motion that we have. Ms. Eliot Bernstein sent the | 19 | not necessarily all that clear. |  |
| 20 | e-mails to Ben Brown and when we end up with, you | 20 | THE COURT: That's why you use discretion and |  |
| 21 | know, a petition for instructions, we had two of | 21 | you decide what to get involved with and whatnot, |  |
| 22 | them on May 23rd, and you instructed everyone that | 22 | and, then depending on that, I may hear from |  |
| 23 | he should not be Elliot's lawyer. And Eliot | 23 | someone else who likes that idea or not. |  |
| 24 | responded he doesn't have to just, you know, jump | 24 | MR. BROWN: What Your Honor said -- actually |  |
| 25 | through hoops. Ben is concerned that he, you | 25 | what Your Honor said on the 23rd was that you |  |


|  | 6 |  |  | 8 |
| :---: | :---: | :---: | :---: | :---: |
| 1 | said, stop, you don't have to go further. That's | 1 | trust, who weren't here on the 23rd, or didn't get |  |
| 2 | the position. That's law. You don't do that. If | 2 | notice. And this is the notice -- service list. |  |
| 3 | there is an accounting, there is a rule on | 3 | I mean, this is everybody. |  |
| 4 | objections. The parties object, they don't use | 4 | THE COURT: Let's put the notice aside. Is |  |
| 5 | you. You don't work for them, which is true, I'm | 5 | there any other -- have you guys agreed upon the |  |
| 6 | no one's here attorney. | 6 | form of the order now, or you didn't notice this? |  |
| 7 | THE COURT: Right. | 7 | MR. ROSE: I think that my comments are |  |
| 8 | MR. BROWN: You work for the court, that's | 8 | minor. I think Mr. Brown approved them. So I |  |
| 9 | what you said. You said, you are not an advocate. | 9 | have no objection to the order. |  |
| 10 | You only investigate things that the parties may | 10 | THE COURT: In this packet, give me a clean |  |
| 11 | be interested in. They can do that -- do what | 11 | order, Mr. Brown. |  |
| 12 | they think they need to do based on the rules of | 12 | MR. BROWN: All right. I didn't have a |  |
| 13 | procedure and the statutes. | 13 | problem with -- it's not necessarily a clean |  |
| 14 | THE COURT: All right. So if someone asked | 14 | order, Your Honor, itself an order. |  |
| 15 | to do something you think is outside the scope of | 15 | THE COURT: One that I can sign, I mean. |  |
| 16 | what I ordered, what I mentioned in the hearings, | 16 | This has Mr. Rose's changes that he has written |  |
| 17 | then don't do it. | 17 | in. |  |
| 18 | MR. BROWN: Your Honor, you also didn't enter | 18 | MR. ELLIOT BERNSTEIN: Can I -- do we all |  |
| 19 | an order on those motions on May 23rd. | 19 | have copies of Roses' things? |  |
| 20 | THE COURT: Well, someone has to submit them | 20 | THE COURT: Let me see what -- |  |
| 21 | to me. | 21 | MR. BROWN: Mr. Rose e-mailed them to |  |
| 22 | MR. BROWN: I did, Your Honor. I | 22 | everybody. But they are attached to that May 30th |  |
| 23 | submitted -- I submitted them to all the parties. | 23 | letter. |  |
| 24 | Mr. Rose had some changes. | 24 | THE COURT: I'll give you a copy of it. Any |  |
| 25 | THE COURT: Okay. | 25 | reason not to sign this based upon that hearing |  |
|  | 7 |  |  | 9 |
| 1 | MR. BROWN: I then -- you then went on | 1 | that I had. |  |
| 2 | vacation and then, unfortunately, got ill. I sent | 2 | MR. ELLIOT BERNSTEIN: Are you saying he's |  |
| 3 | you a letter that said here are the competing | 3 | not authorized, as the estate, if he finds missing |  |
| 4 | orders, and here's what you said. | 4 | items, or whatever, to challenge the accounting as |  |
| 5 | THE COURT: I didn't see the competing | 5 | the -- |  |
| 6 | orders. | 6 | THE COURT: He's not -- he's not filing |  |
| 7 | MR. BROWN: That's the order. Now, Mr. Eliot | 7 | objections to the accounting, the parties are. |  |
| 8 | Bernstein, he had an objection because he said | 8 | You're not, correct? |  |
| 9 | that all of the minor beneficiaries didn't | 9 | MR. ELLIOT BERNSTEIN: But he's the estate, |  |
| 10 | necessarily receive notice of the May 23rd | 10 | isn't he? Isn't he a party known as the estate? |  |
| 11 | hearing. But, in fact, based on the e-mail | 11 | THE COURT: Yeah, but he's a curator, that's |  |
| 12 | report, I believe that everyone has received -- I | 12 | different. |  |
| 13 | mean, here's how long the e-mail service list is. | 13 | MR. BROWN: I'm essentially a caretaker |  |
| 14 | Everybody received notice of everything. | 14 | until -- |  |
| 15 | THE COURT: What's the -- what's the dispute | 15 | MR. ELLIOT BERNSTEIN: Well, wouldn't the |  |
| 16 | now with the form of these orders? | 16 | PR -- |  |
| 17 | MR. BROWN: Well, the dispute was -- Mr. Rose | 17 | THE COURT: Let me ask you this -- |  |
| 18 | had some changes to what I submitted. | 18 | MR. ELLIOT BERNSTEIN: If you got -- if |  |
| 19 | THE COURT: So you folks did -- did you agree | 19 | you're the PR and you got an accounting that's |  |
| 20 | upon the final form? | 20 | fraudulent in front of you, don't you have a duty |  |
| 21 | MR. BROWN: He's got handwritten -- we didn't | 21 | to challenge that and -- |  |
| 22 | agree on a final form because I think, and I don't | 22 | THE COURT: Maybe so, but that's up to |  |
| 23 | want to put words in Elliot's mouth, Eliot said I | 23 | everybody -- |  |
| 24 | don't agree to either orders because there are | 24 | MR. ELLIOT BERNSTEIN: But you're saying he's |  |
| 25 | minor beneficiaries of the trust, the pour-over | 25 | not authorized. |  |


|  |  |  |  | 12 |
| :---: | :---: | :---: | :---: | :---: |
| 1 | THE COURT: He's not. | 1 | trying to get this case closed. |  |
| 2 | MR. ELLIOT BERNSTEIN: You're precluding him. | 2 | I mean, he just said are you having |  |
| 3 | THE COURT: He is not. | 3 | problems scheduling hearings. I want hearings |  |
| 4 | MR. ELLIOT BERNSTEIN: Well, he's the PR | 4 | since, you know, May. |  |
| 5 | tech -- | 5 | THE COURT: Hold on. Let me take a look at |  |
| 6 | MR. BROWN: No, I'm not the personal | 6 | this one. |  |
| 7 | representative, and I have declined to serve. | 7 | Okay. All right. So I'm going to order |  |
| 8 | THE COURT: He's the curator, it's a | 8 | everyone cooperate in coordinating hearings. |  |
| 9 | different role. | 9 | That's a silly thing to have difficulty with. |  |
| 10 | MR. BROWN: In fact, Your Honor, I was | 10 | MR. ELLIOT BERNSTEIN: Am I forced to take a |  |
| 11 | supposed to be the curator for just a couple of | 11 | deposition before I schedule a hearing with you on |  |
| 12 | months. | 12 | an unrelated -- |  |
| 13 | THE COURT: Right. | 13 | THE COURT: You can schedule a hearing. Then |  |
| 14 | MR. BROWN: We don't even have a hearing set. | 14 | you get a hearing date from me. |  |
| 15 | THE COURT: Yeah, the parties have to do the | 15 | MR. ELLIOT BERNSTEIN: He won't schedule a |  |
| 16 | objections to the accounting. | 16 | hearing until I take a deposition. |  |
| 17 | MR. ELLIOT BERNSTEIN: Okay. | 17 | THE COURT: Okay. Here's the way it works. |  |
| 18 | MR. BROWN: Your Honor, it's not anything | 18 | Scheduling is one thing. |  |
| 19 | that's teed up today, is that we don't have a | 19 | MR. ELLIOT BERNSTEIN: Right. |  |
| 20 | hearing set -- | 20 | THE COURT: Discovery is another thing. |  |
| 21 | THE COURT: What do you mean, a hearing on -- | 21 | MR. ELLIOT BERNSTEIN: That's right. |  |
| 22 | MR. BROWN: -- to get a personal | 22 | THE COURT: You try to do your discovery |  |
| 23 | representative. | 23 | based upon hearing dates coming up. So if you get |  |
| 24 | THE COURT: You know, I can't deal with | 24 | a hearing date within 30 days, then that tells you |  |
| 25 | getting hearing dates. Is there a problem with | 25 | you have to have discovery sooner. If you have a |  |
|  |  |  |  | 13 |
| 1 | getting hearing dates? | 1 | hearing in six months, unlikely in my division, |  |
| 2 | MR. BROWN: There's not a problem with | 2 | then, you know, you could spread out your |  |
| 3 | getting hearing dates. It's a problem with | 3 | discovery requests, but they're separate and |  |
| 4 | getting anybody to move to appoint -- thank you -- | 4 | apart. |  |
| 5 | to appoint a personal representative. And -- | 5 | MR. ELLIOT BERNSTEIN: No, but l'm trying to |  |
| 6 | THE COURT: Well, I thought the hearing was | 6 | schedule a hearing and he's refusing unless I |  |
| 7 | on the objections on the accounting. | 7 | take -- |  |
| 8 | MR. BROWN: This is the other one, Your | 8 | THE COURT: You get a hearing. And then |  |
| 9 | Honor. | 9 | depending upon what the nature is that's going to |  |
| 10 | THE COURT: Oh. | 10 | be heard, if discovery is necessary, you do |  |
| 11 | MR. BROWN: There is a motion objecting to | 11 | discovery. They're two independent items. |  |
| 12 | the accountings, but there is no hearing set to | 12 | MR. ELLIOT BERNSTEIN: But your secretary or |  |
| 13 | appoint a personal representative. And l'm -- you | 13 | your clerk has told us that we have to coordinate |  |
| 14 | know, frankly, I'm the curator. I'm -- | 14 | our hearings with these guys, doesn't seem they |  |
| 15 | THE COURT: Well, at some point if no one | 15 | have to do that with us, since none of this is |  |
| 16 | wants to be PR, you know, l'll discharge you and | 16 | scheduled with our knowledge. But nonetheless, if |  |
| 17 | the estate will be closed. Just close the estate. | 17 | I want to schedule a hearing, I got to get |  |
| 18 | MR. BROWN: I think that's the case right | 18 | approval from nine guys, three of them won't |  |
| 19 | now, nobody wants to be a PR. | 19 | respond at all. Alan Rose says you better take a |  |
| 20 | MR. ELLIOT BERNSTEIN: Well, that's not true. | 20 | deposition or I'm not scheduling hearings. And, |  |
| 21 | THE COURT: Well, someone has to file a | 21 | you know, they are trying to delay it so they can |  |
| 22 | petition, though. | 22 | get in all these hearings while a bunch of |  |
| 23 | MR. ELLIOT BERNSTEIN: Well, I'm -- I got a | 23 | criminals sit around -- |  |
| 24 | ton of petitions in that I'm trying to get | 24 | THE COURT: All right. I'll have my |  |
| 25 | hearings. Like I said, they are blocking and | 25 | assistant come out and see you folks when you're |  |

done here, before you all leave, and she'll
coordinate hearings with you.
MR. ELLIOT BERNSTEIN: Well, I can't do that.
I got to --
THE COURT: Why?
MR. ELLIOT BERNSTEIN: -- go back and check
my schedules. Can I call in?
THE COURT: You want quick service and I'm going to give you --

MR. ELLIOT BERNSTEIN: I appreciate that. I greatly appreciate that.

THE COURT: So there's a rule there that says
if you ask for something and I give it to you, like that --

MR. ELLIOT BERNSTEIN: I didn't bring a cell
phone, I don't have my schedule, I got doctors --
that's the biggest concern -- and if I'm free on those days they want to schedule them, great. I already gave them a date, you know, July 14th.

THE COURT: Try to work it out, we'll get there.

MR. ELLIOT BERNSTEIN: Your secretary has been holding it.

MR. BROWN: Judge, the problem with appointing a personal representative is not that
nobody is -- there is no hearing date -- because nobody has actually filed a motion to appoint a personal representative.

THE COURT: But Eliot says he has.
MR. ROSE: There's two motions pending.
There's a petition by Ted to be the personal representative. I think Eliot may have filed a petition to be the personal representative. We need to set those for a contested hearing.

THE COURT: So, Mr. Brown, there are two.
MR. ELLIOT BERNSTEIN: He denied Ted's motion.

MR. ROSE: I'll set them.
MR. ELLIOT BERNSTEIN: Ted already filed a motion to be PR and you denied it.

THE COURT: Go ahead.
MR. ROSE: We had a motion pending, Your
Honor, and you appointed a curator.
THE COURT: Right.
MR. ROSE: In the meantime, to avoid what's going to be a very expensive and costly battle, I've been having discussions with Mr. Brown as curator, a number of discussions of a way to try to streamline -- Mr. Brown can confirm that's the goal.

THE COURT: Sure.
MR. ROSE: Just had those discussions. I've tried to have discussions with some of the other beneficiaries to see if we can at least get a consensus. I thought that was a worthwhile exercise before we have what's going to be a half day or day contested trial on who should be the PR. One of the motions dovetails into that -- I have two motions pending today. One is a motion to compel Eliot to appear for deposition and comply with the privilege rule. We had a hearing you may recall on May 23rd with inadvertent privilege. I have that motion. I also have a motion that relates to Mr. Brown, if you want to do that motion first, in case Mr. Brown wanted to leave. We filed a petition -- a motion for --

MR. ELLIOT BERNSTEIN: I'd like to do the privilege because if we get through this, we'll find out that he might not even be here in a minute.

MR. BROWN: I'd actually prefer to do -MR. ROSE: Do whatever Mr. Brown likes.
MR. BROWN: I don't know that I like it, but I don't have any opposition to it.

MR. ROSE: It's the one about the mortgage.

MR. BROWN: Okay.
THE COURT: Let me see.
MR. ROSE: This is a motion -- this is kind of in line with Your Honor's instructions. Ted Bernstein, as successor trustee of the Simon Bernstein trust, has asked the curator to take action with regard to an asset of the estate. Mr. Brown has indicated, consistent with your ruling, that's not his job. So we have filed a motion seeking instructions. And we are before you addressing one -- there is only a real handful of assets in the estate. One of the assets in the estate of Simon Bernstein is a second mortgage that the estate holds on a piece of property. The property is owned by an entity called Bernstein Family Realty, LLC. That's an entity that was created by Simon while he was alive. And while he was alive, Simon was the manager of that entity. This Bernstein Family Realty, which owns this house, there is also a first mortgage on the house held by the seller back when the house was sold in 2008. So there is a first mortgage of $\$ 110,000$.

THE COURT: Purchase money mortgage?
MR. ROSE: Purchase money mortgage. That mortgage matured, technically, a few years ago and

|  | 18 |  |  | 20 |
| :---: | :---: | :---: | :---: | :---: |
| 1 | they did an amendment, and they extended the term | 1 | property. |  |
| 2 | for three years. The lease matures on June 19th, | 2 | MR. ROSE: They own the property. They are |  |
| 3 | which is in about seven days. Next week. The | 3 | the title owner. They are the mortgage -- they |  |
| 4 | first mortgage, not the lease, the first mortgage | 4 | are the mortgagee of the property. |  |
| 5 | matures. They are owed $\$ 110,000$, plus interest. | 5 | THE COURT: Okay. But who's the mortgagor? |  |
| 6 | The mortgage is held by a gentleman named Walter | 6 | MR. ROSE: Of the second mortgage, Simon |  |
| 7 | Somm. There is unpaid taxes for 2013. We're told | 7 | Bernstein, while he was alive. So now it's the |  |
| 8 | that the house is not insured. Okay. That's the | 8 | estate of Simon Bernstein. |  |
| 9 | starting point. What the estate has, which | 9 | THE COURT: So he owed the money. He's the |  |
| 10 | Mr. Brown is in possession of, is the estate has a | 10 | debtor on the debtor/creditor part of the |  |
| 11 | second mortgage on that property. There's a | 11 | mortgage, Simon was the debtor? |  |
| 12 | second mortgage holder on property when there is a | 12 | MR. ROSE: No, Simon was the creditor. |  |
| 13 | first, unpaid taxes, no insurance, you would want | 13 | THE COURT: Who's the debtor? |  |
| 14 | to take action to try to protect whatever equity | 14 | MR. ROSE: Bernstein Family Realty, an entity |  |
| 15 | is in the property. The current occupant of the | 15 | that owns the house. |  |
| 16 | house -- and just so I can assure you -- we're | 16 | THE COURT: Okay. I'm not -- I thought -- |  |
| 17 | going to hear it in a minute -- this is no way to | 17 | they own the house and Bernstein Family Realty |  |
| 18 | try to harm Eliot. This is trying to protect the | 18 | borrowed $\$ 360,000$, or whatever, the amount of the |  |
| 19 | assets that are in the estate, and try to protect | 19 | second mortgage is? |  |
| 20 | the value of it. But the tenant of the property | 20 | MR. ROSE: Correct. Bernstein Family Realty |  |
| 21 | is Eliot Bernstein and his family. They live in | 21 | potentially owns \$110,000, plus interest, to |  |
| 22 | there rent free. They don't pay taxes. I don't | 22 | Walter Somm. He's the first mortgage holder. And |  |
| 23 | have all the information other than that. | 23 | Bernstein Family Realty also owes 365,000, plus |  |
| 24 | And just if you indulge me for a little | 24 | interest, to the estate of Simon Bernstein. |  |
| 25 | background. I think Simon bought the house for | 25 | THE COURT: Which -- that transaction, how |  |
|  | 19 |  |  | 21 |
| 1 | Eliot. He put the ownership, though, in an | 1 | did that second mortgage come about? |  |
| 2 | entity called Bernstein Family Realty. It's | 2 | MR. ROSE: Simon put -- I think Simon put up |  |
| 3 | encumbered by two mortgages. And the mortgages | 3 | all the money for the house and the renovations. |  |
| 4 | exceed the value of the property. I don't know | 4 | And so in order to -- |  |
| 5 | what it's exactly worth. I attached a Zillow, | 5 | THE COURT: So he had the owner give him a |  |
| 6 | which is not an appraisal. | 6 | second mortgage back. |  |
| 7 | THE COURT: What's the issue, though? | 7 | MR. ROSE: Correct. He was the manager of |  |
| 8 | MR. ROSE: The issue is, someone's got to | 8 | the ownership entity. Simon structured this |  |
| 9 | administer the second mortgage. It's in default | 9 | through Bernstein Family Realty. Bernstein Family |  |
| 10 | and no one has been administering it. And -- | 10 | Realty, after Simon passed away, the new manager |  |
| 11 | THE COURT: You say administering it, seek | 11 | of Bernstein Family Realty is Oppenheimer. And I |  |
| 12 | collection of its payment. | 12 | believe the equity -- the owners of the equity of |  |
| 13 | MR. ROSE: Potentially. Or do something to | 13 | Bernstein Family Realty are three trusts created |  |
| 14 | protect the asset. And in addition, we've asked | 14 | for Elliot's three children. No one is disputing |  |
| 15 | permission to have the estate potentially pay the | 15 | that. But the house is clearly upside down, |  |
| 16 | first -- buy the first mortgage. Because if we | 16 | unless it's worth more than \$500,000, which it |  |
| 17 | don't take care of the first mortgage on June 19, | 17 | doesn't appear to be worth more than \$500,000. If |  |
| 18 | what's going to happen is that Mr. Somm is going | 18 | it is, that's great because that's better for the |  |
| 19 | to hire legal counsel. | 19 | estate. The concern here for Ted as the fiduciary |  |
| 20 | THE COURT: When you say Simon held a note | 20 | for the trust is that we have an asset. It's the |  |
| 21 | and mortgage, second mortgage? | 21 | mortgage. It's not fully secured. It's probably |  |
| 22 | MR. ROSE: Right. | 22 | mostly secured, if you know what I mean, partially |  |
| 23 | THE COURT: Who was -- who's the mortgagor? | 23 | secured. There is equity in the property over and |  |
| 24 | MR. ROSE: Bernstein Family Realty. | 24 | above the first mortgage and the taxes, but |  |
| 25 | THE COURT: I thought they owned the | 25 | there's not enough to pay it off in full. And so |  |


|  | 22 |  |  | 24 |
| :---: | :---: | :---: | :---: | :---: |
| 1 | the concern is that Walter Somm, a third party, | 1 | MR. ROSE: The relief is for first -- at the |  |
| 2 | innocent guy, will have to file a lawsuit to | 2 | request of the curator, the curator would like to |  |
| 3 | foreclose his mortgage. Eliot is potentially | 3 | transfer the asset to the trustee of Simon's |  |
| 4 | going to be a party to that lawsuit because he's a | 4 | revocable trust. |  |
| 5 | tenant. Mr. Somm will probably spend a hundred or | 5 | THE COURT: The property that is owned by |  |
| 6 | \$200,000 in legal fees fighting with Eliot | 6 | Bernstein Family Realty, LLC? |  |
| 7 | Bernstein. And then at the end of the day, poof, | 7 | MR. ROSE: No, technically, the asset is just |  |
| 8 | there is nothing left. And the estate's \$365,000 | 8 | the mortgage. |  |
| 9 | mortgage is worth nothing. | 9 | THE COURT: Is the mortgage. |  |
| 10 | We've raised the issue with Mr. Brown. We | 10 | MR. ROSE: Yeah, you know, the tangible -- |  |
| 11 | have worked very closely with him. | 11 | THE COURT: That's owned by the estate right |  |
| 12 | THE COURT: I understand. | 12 | now. |  |
| 13 | What do you say Eliot? | 13 | MR. ROSE: It's owned by the estate and under |  |
| 14 | MR. ELLIOT BERNSTEIN: Well, to deconstruct | 14 | the control of Mr. Brown. |  |
| 15 | all those lies -- you really want me to start -- | 15 | THE COURT: And you -- |  |
| 16 | my father bought a house for my children. It | 16 | MR. ROSE: They would remain liable for -- |  |
| 17 | wasn't an asset of the estate till suddenly the | 17 | the trustees of the revocable trust is liable for |  |
| 18 | guys who altered the estate documents put it on an | 18 | the debts of a creditor. So, you know, |  |
| 19 | amended inventory, right after the long arm of the | 19 | Mr. Stansbury's counsel is here and he would be |  |
| 20 | law knocked on their door and said come to the | 20 | someone that might object to it. We're not asking |  |
| 21 | sheriff's office. This is part of an extortion. | 21 | to transfer it, other than to have someone other |  |
| 22 | I put it in motion to you. I asked for emergency | 22 | than Mr. Brown, who's not prepared to administer |  |
| 23 | hearings. And what they have done is beyond | 23 | the asset, to administer the asset. In fact, in |  |
| 24 | criminal. First of all, my -- the company, BFR, | 24 | discussions I've had with Mr. Brown, I mean, |  |
| 25 | is owned by my three kids entirely. The house -- | 25 | his -- one of Mr. Brown's discussions with me was |  |
|  | 23 |  |  | 25 |
| 1 | trust owned the house. Okay. My brother and | 1 | he could transfer all the assets in the estate to |  |
| 2 | Oppenheimer conspired -- and I got a whole bunch | 2 | the revocable trust. If the trustee of the |  |
| 3 | of stuff showing what's happened here -- to take | 3 | revocable trust could administer the assets, he |  |
| 4 | over the management position of BFR. When my | 4 | would still be liable to Mr. Stansbury for any |  |
| 5 | father died there was supposed to be vote by the | 5 | claims. And, you know, you could have Mr. Brown |  |
| 6 | members, my three minor children, which could be, | 6 | as a curator take a very nominal role so we don't |  |
| 7 | or my wife, as guardians, to elect a new member. | 7 | have to incur as much money. Alternatively, we |  |
| 8 | Instead, Spallina anointed Janet Craig of | 8 | could have the PR hearing which -- |  |
| 9 | Oppenheimer to self-anoint herself as manager of | 9 | THE COURT: That's what we need to do. We |  |
| 10 | BFR. Then after they misuse all these funds, | 10 | need to have the PR hearing. |  |
| 11 | telling us, oh, we're going to use the kids' | 11 | MR. ELLIOT BERNSTEIN: We need to have an |  |
| 12 | education funds to pay your house expenses, when | 12 | evidentiary hearing on this, don't we, Your Honor? |  |
| 13 | there is all these other entities that have been | 13 | MR. ROSE: But in the short -- |  |
| 14 | paying for the house for years, my brother -- | 14 | THE COURT: Go ahead. |  |
| 15 | Janet Craig of Oppenheimer says, oh, I'm turning | 15 | MR. ROSE: In the short term, if you look at |  |
| 16 | over the management to Ted. She hands him all my | 16 | the exhibit we attached. |  |
| 17 | personal files, my kids, all our statements, | 17 | THE COURT: Yeah, go ahead. |  |
| 18 | bills, everything, which I don't even get the | 18 | MR. ROSE: The second mortgage. It's the |  |
| 19 | bills. They've been going through BFR -- | 19 | Exhibit A. I don't have tabs, I apologize, but if |  |
| 20 | THE COURT: Okay. I got your position. Let | 20 | you flip through -- |  |
| 21 | me ask you this. What's the relief that you're | 21 | THE COURT: I see it. |  |
| 22 | asking for, though? | 22 | MR. ROSE: So there is a promissory note. |  |
| 23 | Hold on. | 23 | It's signed by Simon Bernstein. I mean, I don't |  |
| 24 | I don't know what the relief is, that's | 24 | think there is any question that that's Simon's |  |
| 25 | what l'm trying to figure out. | 25 | signature. And he did it in July of 2008. And if |  |



|  |  | 30 |
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| 1 |  |  |
| 2 | CERTIFICATE |  |
| 3 |  |  |
| 4 | THE STATE OF FLORIDA |  |
|  | COUNTY OF PALM BEACH. |  |
| 5 |  |  |
| 6 |  |  |
| 7 | I, DAVID L. MARSAA, Professional Reporter, |  |
| 8 | State of Florida at large, certify that I was |  |
| 9 | authorized to and did stenographically report the |  |
| 10 | foregoing proceedings and that the transcript is a |  |
| 11 | true and complete record of my stenographic notes. |  |
| 12 | Dated this 15th day of June, 2014. |  |
| 13 |  |  |
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|  | DAVID L. MARSAA, COURT REPORTER |  |
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State of Florida at large, certify that I was
authorized to and did stenographically report the
foregoing proceedings and that the transcript is a
true and complete record of my stenographic notes.
Dated this 15th day of June, 2014.

DAVID L. MARSAA, COURT REPORTER

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