

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

TED BERNSTEIN, as Trustee  
of the Shirley Bernstein Trust Agreement  
dated May 20, 2008, as amended,

PROBATE DIVISION

FILE NO.: 502014CP003698XXXXSB

Plaintiff,

vs.

ALEXANDRA BERNSTEIN; ERIC BERNSTEIN;  
MICHAEL BERNSTEIN; MOLLY SIMON;  
PAMELA B. SIMON, Individually and as Trustee  
f/b/o Molly Simon under the Simon L. Bernstein  
Trust Dtd 9/13/12; ELIOT BERNSTEIN, Individually,  
as Trustee f/b/o D.B., Ja. B. and Jo. B. under the  
Simon L. Bernstein Trust Dtd 9/13/12, and on  
behalf of his minor children, D.B., Ja. B. and Jo. B.;  
JILL IANTONI, Individually, as Trustee f/b/o J.I.  
under the Simon L. Bernstein Trust Dtd 9/13/12, and  
on behalf of her minor child J.I.; MAX FRIEDSTEIN;  
LISA FRIEDSTEIN, Individually, as Trustee f/b/o  
Max Friedstein and C.F., under the Simon L.  
Bernstein Trust Dtd 9/13/12, and on behalf of her  
minor child C.F.,

Defendants.

---

**NOTICE OF SERVICE OF FIRST SET OF  
INTERROGATORIES TO DEFENDANT, JILL IANTONI**

Defendants, MOLLY SIMON, ALEXANDRA BERNSTEIN, ERIC BERNSTEIN and  
MICHAEL BERNSTEIN, by and through their undersigned attorney, file this notice that they  
have served their First Set of Interrogatories to Defendant, JILL IANTONI, on November 25,  
2014, to be answered in writing, under oath, within the time set forth in Fla.R.Civ.P. 1.340.

I HEREBY CERTIFY that a true and correct copy of the foregoing was sent via e-mail to:  
ALAN ROSE, Esquire, 505 South Flagler Drive, Suite 600, West Palm Beach, Florida 33401  
([arose@pm-law.com](mailto:arose@pm-law.com)); ELIOT BERNSTEIN, 2753 NW 34<sup>th</sup> Street, Boca Raton, Florida 33434  
([iviewit@iviewit.tv](mailto:iviewit@iviewit.tv)); PAMELA SIMON, 303 East Wacker Drive, Suite 2725, Chicago, Illinois  
60601 ([psimon@stpcorp.com](mailto:psimon@stpcorp.com)); LISA FRIEDSTEIN ([lisa.friedstein@gmail.com](mailto:lisa.friedstein@gmail.com)); and JILL  
IANTONI ([jilliantoni@gmail.com](mailto:jilliantoni@gmail.com)), this 25<sup>TH</sup> day of November, 2014.

JOHN P. MORRISSEY, P.A.

By: 

John P. Morrissey, Esquire  
330 Clematis Street, Suite 213  
West Palm Beach, FL 33401  
Telephone: (561) 833-0866  
Facsimile: (561) 833-0867  
E-Mail: [john@jmorrisseylaw.com](mailto:john@jmorrisseylaw.com)  
Florida Bar #: 993727

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

TED BERNSTEIN, as Trustee  
of the Shirley Bernstein Trust Agreement  
dated May 20, 2008, as amended,

PROBATE DIVISION

FILE NO.: 502014CP003698XXXXSB

Plaintiff,

vs.

ALEXANDRA BERNSTEIN; ERIC BERNSTEIN;  
MICHAEL BERNSTEIN; MOLLY SIMON;  
PAMELA B. SIMON, Individually and as Trustee  
f/b/o Molly Simon under the Simon L. Bernstein  
Trust Dtd 9/13/12; ELIOT BERNSTEIN, Individually,  
as Trustee f/b/o D.B., Ja. B. and Jo. B. under the  
Simon L. Bernstein Trust Dtd 9/13/12, and on  
behalf of his minor children, D.B., Ja. B. and Jo. B.;  
JILL IANTONI, Individually, as Trustee f/b/o J.I.  
under the Simon L. Bernstein Trust Dtd 9/13/12, and  
on behalf of her minor child J.I.; MAX FRIEDSTEIN;  
LISA FRIEDSTEIN, Individually, as Trustee f/b/o  
Max Friedstein and C.F., under the Simon L.  
Bernstein Trust Dtd 9/13/12, and on behalf of her  
minor child C.F.,

Defendants.

---

**FIRST SET OF INTERROGATORIES  
TO DEFENDANT, JILL IANTONI**

Defendants, MOLLY SIMON, ALEXANDRA BERNSTEIN, ERIC BERNSTEIN and  
MICHAEL BERNSTEIN, by and through their undersigned attorney and pursuant to  
Fla.R.Civ.P. 1340, propound the following interrogatories to be answered by Defendant, JILL  
IANTONI, in writing, under oath, within the time set forth in the aforementioned rule.

I HEREBY CERTIFY that a true and correct copy of the foregoing was sent via e-mail to:  
ALAN ROSE, Esquire, 505 South Flagler Drive, Suite 600, West Palm Beach, Florida 33401  
([arose@pm-law.com](mailto:arose@pm-law.com)); ELIOT BERNSTEIN, 2753 NW 34<sup>th</sup> Street, Boca Raton, Florida 33434  
([iviewit@iviewit.tv](mailto:iviewit@iviewit.tv)); PAMELA SIMON, 303 East Wacker Drive, Suite 2725, Chicago, Illinois  
60601 ([psimon@stpcorp.com](mailto:psimon@stpcorp.com)); LISA FRIEDSTEIN ([lisa.friedstein@gmail.com](mailto:lisa.friedstein@gmail.com)); and JILL  
IANTONI ([jilliantoni@gmail.com](mailto:jilliantoni@gmail.com)), this 25<sup>TH</sup> day of November, 2014.

JOHN P. MORRISSEY, P.A.

By: 

John P. Morrissey, Esquire  
330 Clematis Street, Suite 213  
West Palm Beach, FL 33401  
Telephone: (561) 833-0866  
Facsimile: (561) 833-0867  
E-Mail: [john@jmorrisseylaw.com](mailto:john@jmorrisseylaw.com)  
Florida Bar #: 993727

### **Definitions**

1. The term “Jill” or “you” shall refer to Defendant, Jill Iantoni, individually, as Trustee f/b/o J.I. under the Simon I. Bernstein Trust dated September 13, 2012, and on behalf of her minor child, J.I.
2. The term “Lisa” shall refer to Defendant, Lisa Friedstein, individually, as Trustee f/b/o Max Friedstein and C.F. under the Simon L. Bernstein Trust dated September 13, 2013, and on behalf of her minor child, C.F.
3. The term “Jeff” shall refer to Lisa’s husband, Jeff Friedstein.
4. The term “Pam” shall refer to Defendant, Pamela Simon, individually and as Trustee f/b/o Molly Simon under the Simon L. Bernstein Trust dated September 13, 2013.
5. The term “Ted” shall refer to Plaintiff, Ted Bernstein.
6. The term “Simon” shall refer to Simon Bernstein, Deceased.
7. The term “Shirley” shall refer to Shirley Bernstein, Deceased.
8. The term “Shirley’s Trust” shall refer to the Shirley Bernstein Trust Agreement dated May 28, 2008, as amended.
9. The term “Simon’s Trust” shall refer to the Simon L. Bernstein Trust dated September 13, 2012.

### **Interrogatories**

1. State the name and address of every person answering these interrogatories, and identify every person who assisted in the preparation of their responses, including persons who furnished information necessary to a particular response.
  
2. Provide a year-by-year itemization of all financial support that Jill received from either Simon or Shirley during the period from Jill's high school graduation through September 30, 2012, including (without limitation) airline tickets, vacations, hotels, cruises, college tuition, housing payments, and/or jobs with business owned in whole or in part by Simon.
  
3. Describe in detail all gifts or other transfers of assets from either Simon or Shirley to Jill during the period from Jill's high school graduation through September 30, 2012.
  
4. Describe in detail all checks, business distributions, and/or corporate shares evidencing payments and/or transfers to Jill from any business owned in whole or in part by Simon.

5. Provide a year-by-year itemization of all financial support that any member of Jill's family (including J.I.) received from either Simon or Shirley.
6. Describe in detail all gifts or other transfers of assets from either Simon or Shirley to any member of Jill's family (including J.I.).
7. Provide a year-by-year itemization of all financial support that Shirley received from Jill during Shirley's lifetime.
8. Provide a year-by-year itemization of all financial support that Simon received from Jill during Simon's lifetime.

9. Describe in detail all gifts or other transfers of assets from either Simon or Shirley to Pam during the period from Pam's high school graduation through September 30, 2012.
  
10. Describe in detail all gifts or other transfers of assets from either Simon or Shirley to Ted during the period from Ted's high school graduation through September 30, 2012.
  
11. Describe in detail Simon's business interests from 1987 through 2012, including the name of the company owned (if any), the business conducted by the company, and the financial position of the company (including assets, liabilities, net worth and liquidity).
  
12. Describe in detail Simon's financial position each year from 1987 through 2010, including assets, liabilities, investments, liquid assets and net worth.



13. Describe in detail Shirley's financial position each year from 1987 through 2010, including assets, liabilities, investments, liquid assets and net worth.
  
14. Describe in detail all assets, whether real or personal, tangible or intangible, owned by Simon, either individually or jointly with any other person.
  
15. Describe in detail all assets, whether real or personal, tangible or intangible, owned by any Trust established by Simon.
  
16. Describe in detail all assets, whether real or personal, tangible or intangible, owned by Shirley, either individually or jointly with any other person.

17. Describe in detail all assets, whether real or personal, tangible or intangible, owned by any Trust established by Shirley.
  
  
  
  
  
  
  
  
  
  
18. State whether you agree that Shirley's Trust granted to Simon a limited or special power to appoint trust assets to or for the benefit of Shirley's lineal descendants and their spouses; however, if you do not agree, explain why you do not agree.
  
  
  
  
  
  
  
  
  
  
19. State whether you agree that Simon validly exercised his power of appointment in Shirley's Trust; however, if you do not agree, explain why you do not agree.
  
  
  
  
  
  
  
  
  
  
20. State whether you agree that Simon, through the special power of appointment in Shirley's Trust, directed Shirley's Trustee to divide the remaining trust assets into equal shares for his then living grandchildren, to be added to trusts established for each such grandchild under Simon's Trust; however, if you do not agree, explain why you do not agree.

21. State whether you agree that Simon's "then living grandchildren" are all among the class of permitted appointees as defined in Shirley's Trust to be among Shirley's "lineal descendants and their spouses;" however, if you do not agree, explain why you do not agree.
  
22. State whether you agree that, as a result of Simon's exercise of his power of appointment in Shirley's Trust, neither Jill, Lisa, Ted nor Pam are to receive any portion of the assets in Shirley's Trust; however, if you do not agree, explain why you do not agree.
  
23. State whether you agree that, as a result of Simon's exercise of his power of appointment in Shirley's Trust, the assets in Shirley's Trust are to be distributed in equal shares to Simon's ten (10) living grandchildren, to be added to trusts established for each such grandchild under Simon's Trust; however, if you do not agree, explain why you do not agree.
  
24. State whether you agree that Molly Simon, Alexandra Bernstein, Eric Bernstein and Michael Bernstein are to be included among Simon's living grandchildren in connection with Simon's exercise of his power of appointment in Shirley's Trust; however, if you do not agree, explain why you do not agree.

25. State whether you agree that Shirley's Trust is a valid, authentic and enforceable testamentary document; however, if you do not agree, explain why you do not agree.

26. State whether you agree that Simon's Trust is a valid, authentic and enforceable testamentary document; however, if you do not agree, explain why you do not agree.

\_\_\_\_\_ )  
 JILL IANTONI

STATE OF \_\_\_\_\_ )  
 ) ss:  
 COUNTY OF \_\_\_\_\_ )

The foregoing was sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2014, by JILL IANTONI, who is personally known to me or who has produced \_\_\_\_\_ as identification and who, after being duly sworn, deposes and says that he/she has read the foregoing answers to interrogatories and states the same to be true and correct to the best of his/her knowledge and belief.

\_\_\_\_\_  
 Notary Public  
 Print Name: \_\_\_\_\_  
 My Commission Expires: \_\_\_\_\_