

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, LISA FRIEDSTEIN**

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, LISA FRIEDSTEIN, 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); ELIOT BERNSTEIN, 2753 NW 34th Street, Boca Raton, Florida 33434
(iviewit@iviewit.tv); PAMELA SIMON, 303 East Wacker Drive, Suite 2725, Chicago, Illinois
60601 (psimon@stpcorp.com); LISA FRIEDSTEIN (lisa.friedstein@gmail.com); and JILL
IANTONI (jilliantoni@gmail.com), this 25TH 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
Florida Bar #: 993727

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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;
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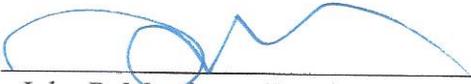
Defendants.

**FIRST SET OF INTERROGATORIES
TO DEFENDANT, LISA FRIEDSTEIN**

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, LISA
FRIEDSTEIN, 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); ELIOT BERNSTEIN, 2753 NW 34th Street, Boca Raton, Florida 33434
(iviewit@iviewit.tv); PAMELA SIMON, 303 East Wacker Drive, Suite 2725, Chicago, Illinois
60601 (psimon@stpcorp.com); LISA FRIEDSTEIN (lisa.friedstein@gmail.com); and JILL
IANTONI (jilliantoni@gmail.com), this 25TH 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
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Definitions

1. The term “Jill” 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” or “you” 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 Lisa received from either Simon or Shirley during the period from Lisa'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 Lisa during the period from Lisa'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 Lisa from any business owned in whole or in part by Simon.

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.

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 Bernstein nor Pam Simon 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.

