

IN THE CIRCUIT COURT IN AND FOR THE 15<sup>TH</sup> JUDICIAL CIRCUIT IN AND FOR  
PALM BEACH COUNTY, FLORIDA

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXSB

Deceased.

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PETITION FOR ORDER AUTHORIZING PAYMENT  
OF ATTORNEY'S FEES AND EXPENSES FOR THE PERSONAL REPRESENTATIVE OF  
THE ESTATE OF SIMON L. BERNSTEIN  
FOR JANUARY 1, 2015 THROUGH MARCH 23, 2015

Petitioner, BRIAN M. O'CONNELL, as Personal Representative of the Estate of Simon L. Bernstein and the attorney for the Personal Representative (collectively "Personal Representative"), alleges:

1. The Personal Representative is an attorney engaged in the practice of law in the State of Florida and is a partner with the law firm of Ciklin Lubitz & O'Connell.

2. On July 24, 2014, he was appointed as the Successor Personal Representative of the Estate of Simon L. Bernstein.

3. The Personal Representative has rendered services and incurred expenses for the benefit of the Estate, from January 1, 2015 to March 23, 2015, as more fully described and set forth in the itemized schedule of services and expenses attached hereto as Exhibit A, for which the Personal Representative has not been paid.

4. The Personal Representative's records indicate that during the period of time above 124 attorney hours and 49.6 paralegal hours have been expended as set forth in the itemized summary of services and expenses attached hereto as Exhibit "A".

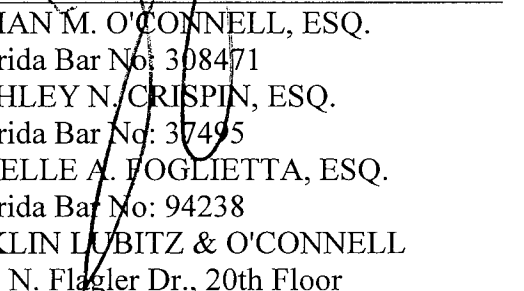
5. The Personal Representative believes that a reasonable fee for the services performed during that period of time is \$38,235.00 and costs of \$1,631.74 – totaling \$39,866.74.

6. The Personal Representative fees and costs described on the attached Exhibit "A" were incurred in discharging administration responsibilities, as more particularly described in Exhibit "A".

WHEREFORE, BRIAN M. O'CONNELL, as Personal Representative of the Estate of SIMON L. BERNSTEIN and the attorney for the Personal Representative, requests this Court award the Personal Representative a reasonable fee for his services and expenses incurred, and authorizing the payment of such fees and expenses from the assets of the estate.

Under penalties of perjury, I declare that I have read the foregoing, and the facts alleged are true, to the best of my knowledge and belief.

Dated May 8 2015.

  
BRIAN M. O'CONNELL, ESQ.  
Florida Bar No: 308471  
ASHLEY N. CRISPIN, ESQ.  
Florida Bar No: 37495  
JOIELLE A. FOGLIETTA, ESQ.  
Florida Bar No: 94238  
CIKLIN LUBITZ & O'CONNELL  
515 N. Flagler Dr., 20th Floor  
West Palm Beach, FL 33401  
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Facsimile: 561-833-4209  
primary e-mail: [service@ciklinlubitz.com](mailto:service@ciklinlubitz.com)  
secondary e-mail: [slobdell@ciklinlubitz.com](mailto:slobdell@ciklinlubitz.com)

I HEREBY CERTIFY that a true and correct of the foregoing was sent by e-mail service or U.S. Postal Service on the 8<sup>th</sup> day of May, 2015 to the parties on the attached Service List.



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BRIAN M. O'CONNELL  
Florida Bar No: 308471  
ASHLEY N. CRISPIN  
Florida Bar No: 37495  
JOIELLE A. FOGLIETTA  
Florida Bar No: 94238  
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SERVICE LIST

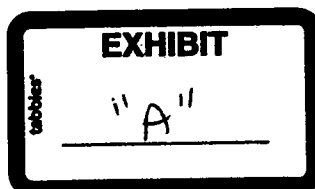
<p>Alan B. Rose, Esq. Page, Mrachek, Fitzgerald &amp; Rose, PA. 505 S. Flagler Dr., Suite 600 West Palm Beach, FL 33401 (561) 355-6991 <a href="mailto:arose@mrachek-law.com">arose@mrachek-law.com</a> <a href="mailto:mchandler@mrachek-law.com">mchandler@mrachek-law.com</a> Attorney for Ted S. Bernstein</p>	<p>John P. Morrissey, Esq. 330 Clematis St., Suite 213 West Palm Beach, FL 33401 <a href="mailto:john@jmorrisseylaw.com">john@jmorrisseylaw.com</a> Attorney for Molly Simon et al</p>	<p>Irwin J. Block, Esq. Law Office of Irwin J. Block, PL 700 South Federal Hwy. Ste 200 Boca Raton, FL 33432 <a href="mailto:ijb@ijblegal.com">ijb@ijblegal.com</a> Attorney for Tescher and Spallina</p>
<p>Peter Feaman, Esq. Peter M. Feaman, P.A. 3695 Boynton Beach Blvd., Suite 9 Boynton Beach, FL 33436 <a href="mailto:pfeaman@feamanlaw.com">pfeaman@feamanlaw.com</a></p>	<p>Shendell &amp; Pollock, P.L. 2700 N. Military Trail, suite 150 Boca Raton, FL 33431 241-2323 Fax: 241-2330 Gary R. Shendell, Esq. <a href="mailto:gary@shendellpollock.com">gary@shendellpollock.com</a> <a href="mailto:estella@shendellpollock.com">estella@shendellpollock.com</a> <a href="mailto:grs@shendellpollock.com">grs@shendellpollock.com</a> Kenneth S. Pollock, Esq. <a href="mailto:ken@shendellpollock.com">ken@shendellpollock.com</a> <a href="mailto:britt@shendellpollock.com">britt@shendellpollock.com</a> <a href="mailto:grs@shendellpollock.com">grs@shendellpollock.com</a>  Attorney for Tescher and Spallina</p>	<p>Max Friedstein 2142 Churchill Lane Highland Park, IL 60035 Beneficiary</p>
<p>Eliot Bernstein and Joshua, Jacob and Daniel Bernstein, Minors c/o Eliot and Candice Bernstein, Parents and Natural Guardians 2753 N.W. 34<sup>th</sup> St. Boca Raton, FL 33434 <a href="mailto:iviewit@iviewit.tv">iviewit@iviewit.tv</a></p>	<p>Pamela Beth Simon 950 N. Michigan Ave., Apt. 2603 Chicago, IL 60611 <a href="mailto:psimon@stpcorp.com">psimon@stpcorp.com</a></p>	<p>Lisa Friedstein and Carley Friedstein, Minor c/o Jeffrey and Lisa Friedstein Parent and Natural Guardian 2142 Churchill Lane Highland Park, IL 60035 <a href="mailto:Lisa@friedsteins.com">Lisa@friedsteins.com</a> <a href="mailto:Lisa.friedstein@gmail.com">Lisa.friedstein@gmail.com</a> Beneficiary</p>
<p>Jill Iantoni and Julia Iantoni, a Minor c/o Guy and Jill Iantoni, her Parents &amp; Natural Guardians 2101 Magnolia Lane Highland Park, IL 60035 <a href="mailto:jilliantoni@gmail.com">jilliantoni@gmail.com</a></p>		

Ciklin Lubitz & O'Connell  
515 North Flagler Drive, 20th Floor  
West Palm Beach, FL 33401  
561-832-5900

Brian M. O'Connell, Esq.  
c/o BMO

Bernstein, Simon L. Estate

Total for Legal Services	\$21,032.50
Total for Expenses	<u>\$945.11</u>
TOTAL:	\$22,877.61



Brian M. O'Connell, Esq.  
c/o BMO

Re: Bernstein, Simon L. Estate

01/02/15	BMO	Receipt and review of 1/2/15 BCL memo.	0.10
01/02/15	BMO	Instructions to Bidy.	0.10
01/02/15	CCL	Pay bills	0.10
01/02/15	CCL	Prepare for JF meeting re: [REDACTED]	0.10
01/02/15	CCL	Review records for 1/5/15 deposition prep	0.20

01/02/15	CCL	Work on fee petition for Nov and Dec (.3); instructions from JF and BMO re: [REDACTED] (.2); Review correspondence regarding Eliot's claim and setting hearing on same (.1).	0.60
01/05/15	BMO	Receipt and review of 1/5/15 e-correspondence from Alan Rose.	0.10
01/05/15	CCL	Administrative Support to Attorneys NO CHARGE	2.00
01/05/15	CCL	Memo to BMO re: [REDACTED]	0.10
01/05/15	CCL	Memo from JF; revise Notice of Hearing -Status Conference on Motion to Intervene	0.20
01/05/15	CCL	Instructions from JF; Correspond with Stamos firm re: 1/5/15 deposition in Federal Court matter (multiple calls and emails)	0.90
01/05/15	CCL	Additional instructions from JF re: [REDACTED]	0.40
01/05/15	CCL	Efile and serve hearing notice; additional document review, categorizing and preparation for hearings on Motion to Intervene, T. Bernstein's Motion for Instructions re: Mortgage , Pet Approve Settlement, Pet of Stansbury for discharge from further responsibility	0.90
01/05/15	JAF	Instructions from BMO re: [REDACTED] (.3); Addressed issues re: same (.2); Instructions to BL re: [REDACTED] (.6); Addressed issues [REDACTED] (.2); Reviewed pertinent pleadings and attended deposition of David Simon (2.7).	4.00
01/06/15	BMO	Receipt and review of 1/6/15 e-correspondence from Alan Rose and related memos from JAF re: [REDACTED]	0.20
01/06/15	BMO	Receipt and review of additional 1/6/15 email communications (x2), Alan Rose, Eliot Bernstein.	0.10
01/06/15	BMO	Strategy conference with JAF re: [REDACTED]	0.30

01/06/15	CCL	Review correspondence from Feaman and from Rose; Receive, review and categorize documents	0.30
01/06/15	CCL	Prepare for conference with JF re: [REDACTED] [REDACTED] review [REDACTED] [REDACTED] compile documents for attorney's review	2.50
01/06/15	JAF	Strategy conference with Jim Stamos re: [REDACTED] (.3); Addressed issues re: [REDACTED] (1.3); Strategy conference with BMO re: [REDACTED] (.3).	1.90
01/07/15	BMO	Strategy conference with JAF re: [REDACTED] [REDACTED] [REDACTED] prepare for hearing on Motion to Intervene, and prepare for Hearing on Stansbury payment of Illinois litigation.	0.60
01/07/15	BMO	Receipt and review of Notice of Hearing and Amended Notice of Hearing re: hearing set for 1/13/15, filed by Eliot 1/7/15.	0.10
01/07/15	BMO	Receipt and review of Notice of Unavailability filed by Feaman 1/7/15.	0.10
01/07/15	BMO	Receipt and review of JAF 1/7/15 memo.	0.10
01/07/15	CCL	Conferences with / instructions from JF (.7); draft proposed order re: Stansbury matter for 1/8/15 hearing (.2); compile correspondence and records for attorney's preparation for hearings on mortgage, motion to intervene and Stansbury Pet Discharge Resp. (.6);	1.50
01/07/15	CCL	Continued review and categorization of documents; prepare for staff conference	0.80
01/07/15	CCL	Document revisions and finalize 3 proposed orders for hearing on pet for instructions/mortgage issues (.9); search and compile [REDACTED] [REDACTED] [REDACTED] (.7); finalize 3 hearing folders and court reporter arrangements (.9)	2.60
01/07/15	ANG	Instructions to JAF re: [REDACTED]	0.20



01/07/15	JAF	Prep for hearing on mot for instructions re: pet for instr on mortgage, prep for hearing on mot to intervene, and prep for hearing on Stansbury payment of Illinois litigation; instructions to BL re: [REDACTED] (3.4); Strategy conference with BMO [REDACTED] (.6); Reviewed information [REDACTED] (.3).	4.30
01/08/15	BMO	Prepare for and attend hearings on multiple motions and petitions.	3.80
01/08/15	BMO	Instructions to JAF.	0.10
01/08/15	BMO	Receipt and review of JAF 1/8/15 memo.	0.10
01/08/15	BMO	Receipt and review of 1/8/15 voice mail communication from Eliot Bernstein.	0.10
01/08/15	CCL	Instructions from JF, prepare hearing notice re: 1/27/15 , efile and eserve (.3); letter to JA (.3)	0.60
01/08/15	CCL	Review status of outstanding issues including Hrg on Objection to Accounting; review correspondenced; memo to JF	0.40
01/08/15	CCL	Assist attorneys with post hearing issues, document review NO CHARGE	1.10
01/08/15	JAF	Prep for hearing on Elliot stmt of claim and pet for instructions (.2, plus .1 NO Charge); Instructions to BL re: [REDACTED] (.1).	0.30
01/09/15	BMO	Strategy conference with JAF re: [REDACTED] (.5); Preparation for hearing [REDACTED] (.3).	0.80
01/09/15	JAF	Prep for hearing re: [REDACTED] (.1); Strategy conference with BMO [REDACTED] (.5).	0.60
01/12/15	BMO	Review of Feaman Settlement Agreement with ANC to compare and contrast with the SA attached to Motion to Approve.	0.20
01/12/15	BMO	Strategy conference with JAF [REDACTED]	0.40
01/12/15	BMO	Receipt and review of 1/12/15 correspondence from Peter Feaman with attached proposed Settlement Agreement signed by Mr. Stansbury.	0.10

01/12/15	BMO	Receipt and review of 1/12/15 email communications (x3), Anthony Messuri (accountant), JAF, Biddy.	0.10
01/12/15	CCL	Instructions from JF; draft agreed order approving Motion to Intervene; draft correspondence	0.40
01/12/15	CCL	Finalize and File Motion to Intervene in Shirley Bernstein Trust matter; finalize proposed agreed order on same; email with interested parties; draft order to judge	0.20
01/12/15	CCL	Memo to Attorneys re: [REDACTED] [REDACTED] [REDACTED]	0.20
01/12/15	ANG	Review of Feaman Settlement Agreement with BMO [REDACTED] [REDACTED]	0.20
01/12/15	JAF	Prepared for hearing on Pet for instr re: Elliot stmt of claim (1.2); Strategy conference with BMO [REDACTED] (.4); INstructions to SHM re: [REDACTED] [REDACTED] (.1); Conference with Candice re: [REDACTED] (.1); Memo to BL [REDACTED] (.1);	1.90
01/13/15	BMO	Prepare for and attend Hearing on Eliot's Statements of Claim and Petition for Instructions re: same.	2.30
01/13/15	BMO	Hearing preparation with ANC.	0.30
01/13/15	ANG	Preparation with BMO prior to hearing.	0.30
01/13/15	JAF	Reviewed email from Elliot Bernstein re: request for information on voluntary employees beneficiary association.	0.10
01/14/15	CCL	Review court docket and portal emails; finalize letter and prepare package to Court with courtesy copy of motion and proposed order re: Shirley case # 2014CP3698	0.70
01/15/15	BMO	Receipt and review of Notice of Appearance on Behalf of Tescher & Spallina, PA, filed by Shendell & Pollock 1/15/15.	0.10
01/15/15	BMO	Receipt and review of Notice of Hearing for 1/27/15, filed by Eliot Bernstein 1/15/15.	0.10
01/15/15	BMO	Receipt and review of Notice of Hearing for 1/27/15, filed by Alan Rose 1/15/15.	0.10

01/15/15	BMO	Receipt and review of 1/15/15 Block e-correspondence to counsel.	0.10
01/15/15	CCL	Prepare memo/instructions re: [REDACTED] [REDACTED] [REDACTED]	0.10
01/15/15	CCL	Review correspondence; assist JF and SHM with preparation for hearings on multiple motions filed by BMO, Feaman and Eliot Bernstein	0.70
01/15/15	SHM	Draft M/Continue 2/9/15 hearing. Draft N/Hearing.	1.00
01/15/15	JAF	Instructions to SHM re: [REDACTED] [REDACTED] (.3); Revisions to same (.2).	0.50
01/16/15	BMO	Telephone call to Alan Rose re: objection hearing and jewelry.	0.20
01/16/15	BMO	Receipt and review of 1/16/15 e-correspondence from Kevin Horan.	0.10
01/16/15	JAF	Addressed issues re: [REDACTED] (.3); Reviewed Elliot request for money (.3).	0.60
01/17/15	BMO	Receipt and review of 1/16 and 1/17/15 email communications (3), Eliot Bernstein, Kevin Horan.	0.10
01/18/15	BMO	Email to Kevin Horan.	0.10
01/19/15	BMO	Strategy conference with ANC re: [REDACTED]	1.30
01/19/15	ANG	Strategy conference with BMO re: [REDACTED]	1.30
01/19/15	SHM	Conference with ANC & JAF. Review of pending issues. Review outline and various documents to prepare as instructed.	1.20
01/19/15	JAF	Addressed issues re: [REDACTED] [REDACTED] (.3); Revisions to pet for auth to conduct discovery (.2); Drafted memo to BL [REDACTED] (.4); Drafted memo to ANC re: [REDACTED] (.4); Prepared email to Elliot re: request for information on BFR (.1).	1.40

01/19/15	JAF	Revisions to answer and affirmative defenses to Ted amended complaint (.3); Prep for hearing on pet for ext of stmt of claim (.4); Addressed issues re: [REDACTED] (.3); Consideration of issues re: [REDACTED] (.4).	1.40
01/19/15	JAF	Addressed issues re: [REDACTED] (.1); Reviewed statements from CPA (.2).	0.30
01/20/15	BMO	Telephone call with Abby Bhierman.	0.30
01/20/15	BMO	Telephone conference with Peter Feaman.	0.40
01/20/15	CCL	Correspond with Rose' office re: hearing, document review; calls from JF	0.20
01/20/15	ANG	Instructions from BMO re: [REDACTED]	0.20
01/21/15	CCL	Review emails re: upcoming hearings; prepare for conference with JF	0.20
01/22/15	BMO	Receipt and review of Notice of Hearing for 2/9/15 filed by Feaman 1/22/15.	0.10
01/22/15	BMO	Receipt and review of Eliot Bernstein's First Request for Production of Documents and Things Propounded on Brian O'Connell, filed by Eliot 1/22/15.	0.20
01/22/15	CCL	Work on arranging re-inspection, appraisal of tangible property	0.30
01/22/15	CCL	Work on categorizing multiple pleadings and notices for upcoming hearings.	1.20
01/22/15	JAF	Instructions to BL re: [REDACTED] (.3); Addressed issues re: [REDACTED] (.2); Reviewed emails from Elliot re: additional estate assets (.2).	0.70
01/23/15	CCL	Review JPMorgan account and tax issues; memo to JPMorgan, BMO, JF	0.30
01/23/15	CCL	Review / calendar correspondence	0.20
01/26/15	CCL	Work on TPP reinspection, email Brown, call Appraiser's International	0.40
01/26/15	ANG	Conference with JAF re: [REDACTED]	0.10
01/26/15	SHM	Preparation for hearing.	1.20

01/26/15	JAF	Prep for settlement hearing and statement of claim hearing (1.7); Instructions to SHM re: ██████████ (.2); Conference with ANC re: ██████████ ██████████ (.1); Addressed issues re: JP Morgan account information (.1).	2.10
01/27/15	BMO	Hearing prep with ANC for 1/27 hearing.	0.70
01/27/15	BMO	Prepare for and attend hearing.	3.70
01/27/15	ANG	Prepare for 1/27 hearing.	0.70
01/27/15	JAF	Conference with Elliot and Candice Bernstein re: request for loan (.3); Prepared memo to BMO re: ██████████ (.2); Prep for hearing on approval of SA (.2); Prep for hearing on elliot stmt of claim (.2).	0.90
01/28/15	BMO	Conference with JAF ██████████ ██████████	0.20
01/28/15	BMO	Receipt and review of Motion to Strike Stansbury's Objections to Accounting of Tescher & Spallina and/or To Declare the Objections Abandoned, filed by Irwin Block 1/28/15.	0.10
01/28/15	CCL	Email Sahm's attorney for mortgage payoff letter re: assuming mortgage; calls with JPMorgan to obtain statement copies and correct address mistakes	0.90
01/28/15	CCL	Instructions from JF; email exchanges with JF and RBC; review and compile financial and tax information for RBC review	0.60
01/28/15	CCL	Received secured emails from JPMorgan; review December statements	0.30
01/28/15	ANG	Review tax calculation.	0.30
01/28/15	JAF	Prepared memo to BMO re: ██████████ ██████████ (.3); Conference with BMO re: ██████████ (.2); Consideration of and research re: ██████████ (1.9); Conference with and instructions to BL re: ██████████ (.3); Prep for hearing on continuance of objections to acting (.3).	3.00
01/29/15	BMO	Prepare for and attached status conference hearing.	1.70
01/29/15	CCL	Administrative support to attorneys NO CHARGE	0.90

01/29/15	CCL	Review RBC memo; review and compile additional records for tax return FYE 8/31/14; additional communications with JF, RBC re: [REDACTED]	1.20
01/29/15	CCL	Brief review of Eliot's email re: IRA; search records memo to JF [REDACTED]	0.30
01/29/15	SHM	Review and organization of back pleadings.	1.50
01/29/15	SHM	Revise letter to Alan Rose.	0.10
01/29/15	JAF	Revisions to letter to Alan Rose re: request for asset information and trust accounting under 736.0813 (.2); Addressed issues re: [REDACTED] (.9).	1.10
01/30/15	BMO	Telephone call with Peter Feaman re: settlement.	0.30
01/30/15	BMO	Prepare for and attend settlement conference.	4.30
01/30/15	BMO	Conference with JAF re: [REDACTED] (.1); conference with ANC and JAF [REDACTED]	0.30
01/30/15	BMO	Receipt and review of Motion to Compel Trust Accounting filed by Eliot 1/30/15 and proposed Order re: same.	0.20
01/30/15	TCD	Conference with Joielle A. Foglietta, Esq.; memoranda to parties.	0.50
01/30/15	CCL	Review IRA records	0.10
01/30/15	CCL	Call Gray & Robinson re: Bernstein Family Realty LLC; review records on hand regarding property insurance; instructions from JF	0.80
01/30/15	ANG	Conference with JAF re: [REDACTED] (.2); conference with BMO and JAF [REDACTED] (.2).	0.40
01/30/15	ANG	Conference with JF re: [REDACTED]	0.70

01/30/15	JAF	Conference with counsel re: Illinois litigation (.2); Prepared memo to BMO re: ██████████ (.2); Analysis ██████████ ██████████ (2.5); Conferences (x2) with RBC re: ██████████ (1.2); Conference with BMO re: ██████████ (.1).	4.20
01/30/15	JAF	Revisions to letter to Rose for request of payment from trust and letter to all for summary of estate cash and tax implications (.5); Strategy conference with BMO and ANC re: ██████████ (.2).	0.70
02/02/15	TCD	Beneficiary document transmittal; memorandum to paralegal Sherri McDowell.	0.50
02/02/15	CCL	Received Order on Motion to Intervene; instructions from JF; email all parties and draft amended order (actual time .4; .2 at NO CHARGE)	0.20
02/02/15	CCL	Work on mortgage assignment	0.40
02/02/15	JAF	Instructions to BL re: order on intervention and revisions to same (.1); Instructions to SHM re: ██████████ (.1); Addressed issues re: ██████████ (.1).	0.30
02/03/15	CCL	Review Sahn mortgage, amended mortgage and note; finalize drafted Assignment of Mortgage; memo to JF	0.50
02/03/15	JAF	Addressed issues re: ██████████ ██████████	0.40
02/04/15	CCL	Memo to JF/BMO	0.10
02/04/15	CCL	Final preparatoin for hearing re: amended order, emails re: no position regarding intervening; instructions from JF; status memo regarding other pending issues.	0.90
02/04/15	ANG	Strategy conference with JAF re: ██████████ ██████████	0.20
02/04/15	SHM	Review pending issues - prepare file for upcoming hearing(s).	2.00

02/04/15	JAF	Instructions to BL re: [REDACTED] (.1); Addressed issues re: [REDACTED] (.5); Strategy conference with ANC re: [REDACTED] (.2).	0.80
02/05/15	JAF	Attended hearing on order on mot to intervene; instructions to SHM re: [REDACTED] (.9); Instructions to SHM re; [REDACTED] (.2).	1.10
02/06/15	BMO	Receipt and review of Notice of Hearing for 4/2/15 filed by Eliot 2/6/15.	0.10
02/06/15	CCL	Call from atty Cappaellar's office for Sahm; memo to JF re: [REDACTED]	0.50
02/06/15	CCL	Review and Compile tax records for RBC; work on tax memo	1.00
02/06/15	JAF	Reviewed statements from JP Morgan.	0.20
02/09/15	CCL	Review payoff letter; work on interest computation per JF instructions	0.20
02/09/15	JAF	Consideration of and review of payoff letter and terms re: 1st mortgage (.5); Conference with BMO re: [REDACTED] (.1).	0.60
02/10/15	CCL	Organize files for JF/BMO/SHM	0.50
02/10/15	ANG	Review, revise and sign Petition for Fees and Costs.	0.30
02/10/15	ANG	Review order relating to filing of new claims and instructions to SHM re: [REDACTED]	0.40
02/10/15	JAF	Instructions from BMO re: [REDACTED] (.1); Instructions to SHM re: [REDACTED] (.1); Instructions to BL [REDACTED] (.2).	0.40

TOTAL

\$21,932.50

**LEGAL SERVICES SUMMARY**

ASHLEY GIROLAMO CRISPIN	5.30 Hrs	\$295/Hr	\$1,563.50
BRIAN M O'CONNELL	24.9 Hrs	\$350/Hr	\$ 8,715.00
BIDDY C LABUTKA	29.80 Hrs	\$125/Hr	\$3,725.00
JOY A FOGLIETTA	33.80 Hrs	\$205/Hr	\$6,929.00
SHERRI H MCDOWELL	7.00 Hrs	\$125/Hr	\$875.00
TRUDY C DODSON	1.00 Hrs	\$125/Hr	\$125.00
	101.8 Hrs		\$21,932.50



**COSTS ADVANCED**

Postage			
02/11/15	Postage	18.92	
	Total Postage		18.92
Copy/Printing Expense			
02/11/15	Copy/Printing Expense	389.10	
	Total Copy/Printing Expense		389.10
Long Distance Telephone			
02/11/15	Long Distance Telephone	4.34	
	Total Long Distance Telephone		4.34
Court Reporter Costs			
01/30/15	Pleasanton, Greenhill, Meek & Marsaa	238.75	
01/30/15	Pleasanton, Greenhill, Meek & Marsaa	155.00	
01/30/15	Pleasanton, Greenhill, Meek & Marsaa	125.00	
	Total Court Reporter Costs		518.75
Photocopy			
02/06/15	Collin C. Labutka; Clerk of Court-2012 court copies	10.00	
02/06/15	Collin C. Labutka; court copies	4.00	
	Total Photocopy		14.00
	TOTAL COSTS		<u>\$945.11</u>
	TOTAL THIS BILL		\$22,877.61

Ciklin Lubitz & O'Connell  
515 North Flagler Drive, 20th Floor  
West Palm Beach, FL 33401  
561-832-5900

Brian M. O'Connell, Esq.  
c/o BMO

Bernstein, Simon L. Estate

Total for Legal Services	\$16,302.50
Total for Expenses	<u>\$686.63</u>
Total for This Bill	\$16,989.13

Ciklin Lubitz & O'Connell  
515 North Flagler Drive, 20th Floor  
West Palm Beach, FL 33401  
561-832-5900

Brian M. O'Connell, Esq.  
c/o BMO

Re: Bernstein, Simon L. Estate

<u>Date</u>	<u>Atty</u>	<u>Description</u>	<u>Time</u>
01/19/15	BMO	Receipt and review of 1/19/15 email communications (7), Alan Rose, Irwin Block, JAF, BCL.	0.20
01/20/15	BMO	Receipt and review of 1/20/15 email from Maryanne Koskey with attached Settlement Agreement signed by Feaman and Stansbury.	0.10
01/20/15	BMO	Receipt and review of 1/20/15 email communications (8), Eliot Bernstein, Alan Rose, Court Reporter, JAF, SHM.	0.20
01/22/15	BMO	Receipt and review of JAF 1/22/15 memo.	0.10
01/23/15	BMO	Receipt and review of JAF 1/23/15 memo.	0.10
01/23/15	BMO	Receipt and review of BCL 1/23/15 e-correspondence to J. P. Morgan.	0.10
01/26/15	BMO	Receipt and review of 1/26/15 letter by Feaman to Judge Colin with attached Memorandum of William Stansbury in Support of P.R.'s Motion to Enter into Settlement Agreement.	0.30
01/27/15	BMO	Receipt and review of Notice of Electronic Mail Address Designations filed by Shendell firm 1/27/15.	0.10
01/27/15	BMO	Instructions to JAF.	0.10
01/28/15	BMO	Receipt and review of JAF 1/28/15 memo.	0.10

01/29/15	BMO	Receipt and review of JAF and BCL 1/29/15 memos (x2).	0.10
01/29/15	BMO	Receipt and review of 1/29/15 e-correspondence from Eliot Bernstein.	0.10
01/29/15	BMO	Receipt and review of additional 1/29/15 email communications (x2), Alan Rose, Eliot Bernstein.	0.10
01/30/15	BMO	Receipt and review of JAF 1/30/15 memo.	0.10
01/30/15	BMO	Receipt and review of 1/30/15 email communications (x2), Alan Rose, Eliot Bernstein.	0.10
02/02/15	BMO	Instructions to JAF.	0.10
02/02/15	BMO	Receipt and review of 2/2/15 email communications (5).	0.10
02/03/15	BMO	Receipt and review of 2/3/15 email communications (x3), Alan Rose, John Morrissey, JAF.	0.10
02/06/15	BMO	Receipt and review of 2/6/15 email communications (x3), Charles Heartsfield, JAF, BCL.	0.10
02/06/15	SHM	Conference with BLC re: [REDACTED] [REDACTED] Review ttd list and organize.	0.50
02/09/15	BMO	Conference with JAF re: [REDACTED] [REDACTED]	0.10
02/10/15	BMO	Strategy conference with ANC concerning [REDACTED]	0.20
02/10/15	BMO	Review ANC research memo.	0.20
02/10/15	ANG	Research re: [REDACTED] [REDACTED] [REDACTED]	0.60
02/10/15	ANG	Strategy conference with BMO re: [REDACTED] [REDACTED]	0.20
02/10/15	SHM	Review of entries for preparation of fee petition.	0.40
02/11/15	CCL	Instructions from JF	0.20
02/11/15	CCL	Admin support to BMO	0.40
02/11/15	SHM	Finalize N/Unavailability for filing	0.20
02/11/15	JAF	Addressed issues re: [REDACTED] [REDACTED]	0.20

02/12/15	JAF	Addressed issues re: [REDACTED] [REDACTED]	0.30
02/12/15	JAF	Returned call and had conference with Elliot Bernstein re: request for funds.	0.10
02/13/15	BMO	Receipt and review of Notice of Hearing for 3/31/15 Evidentiary Hearing noticed by Eliot 2/13/15.	0.10
02/13/15	JAF	Instruction memo to SHM re: [REDACTED] [REDACTED] (.2); Addressed issues re: [REDACTED] (.1); Revisions to answer and aff def to amended complaint, analysis of Simon Trust and Shirley Trust, prepared memo to BMO re: [REDACTED] (.9).	1.20
02/17/15	CCL	Memo from RBC; compile tax information and questions to RBC and JF	0.20
02/17/15	CCL	Prepare tangible personal property appraiser information for JF; Instructions from JF; review information from ANC	0.40
02/17/15	ANG	Strategy conference with JAF re: [REDACTED] [REDACTED]	0.50
02/17/15	JAF	Instructions to BL re: [REDACTED] [REDACTED] (.3); Revisions to answer and affirmative defense to amended complaint, additional consideration and analysis of trust documents and provisions (2.2); Strategy conference with ANC re: [REDACTED] (.5).	3.00
02/17/15	JAF	Revisions to mot for instr or mot for compliance with case management order re RTP from Elliot.	0.10
02/18/15	BMO	Receipt and review of Amended Petition for Discharge of Administrator ad Litem and Payment of AAL's Fees, filed 2/18/15 by Benjamin Brown.	0.20
02/18/15	CCL	Work on getting trust beneficiary info for RBC. Email exchanges re: [REDACTED]	0.50
02/19/15	BMO	Instructions to ANC re: [REDACTED] [REDACTED]	0.30
02/19/15	BMO	Receipt and review of Notice of Hearing filed 2/19/15 by Benjamin Brown for 2/26/15.	0.10
02/19/15	BMO	Conference with Alan Rose re: case overview.	0.80

02/19/15	CCL	Call form Sahm's attorneys office; revise and finalize mortgage assignment and allonge; memo to attorneys	0.80
02/19/15	ANG	Instructions from BMO re: outcome of conference with Rose.	0.30
02/19/15	JAF	Correspondence with Heartsfield re: [REDACTED] (.1); Addressed issues re: [REDACTED] (.1); Reviewed interest calculations (.2).	0.40
02/20/15	JAF	Revisions to motion for instructions and or to compel compliance with courts case management order re: Elliot RTP (1.2); Consideration of response to motion to compel in Shirley Trust action (.3); Reviewed email from Elliot (.1).	1.60
02/23/15	BMO	Conference with JAF re: [REDACTED] (.3); Conference with JAF re: [REDACTED] (.2).	0.50
02/23/15	BMO	Review, revise (multiple) and sign letter to beneficiaries.	1.40
02/23/15	CCL	Update accounting/bookkeeping file; additional tax memo	0.30
02/23/15	SHM	Draft N/Hearing per JAF instructions. Make revision and prepare 2nd N/Hearing. Finalize letter and notices. File and serve.	1.00
02/23/15	JAF	Addressed issues re: [REDACTED] (.9); Conference with BMO re: [REDACTED] (.3); Multiple revisions to motion for extension of time to response to RTP of Elliot and mot for instructions, etc. (.5); Revisions to letter to beneficiaries re: settlement with Stansbury and payoff of 1st mortgage (.4); Prepared email to Alan Rose re: request for contribution from Trust (.1).	2.20
02/23/15	JAF	Instructions to SHM re: [REDACTED] (.8); Addressed issues re: [REDACTED] (.1).	0.90

02/23/15	JAF	Conference with Alan Rose re: request for contribution and default interest (.1); Conference with BMO re: [REDACTED] (.2); Revisions to letter to beneficiaries (.3).	0.60
02/24/15	ANG	Conducted research [REDACTED]	0.50
02/24/15	SHM	Research re: [REDACTED]	0.50
02/24/15	SHM	Review of e-mail and conference with JAF re: [REDACTED]	0.50
02/24/15	JAF	Addressed issues re: [REDACTED] [REDACTED] prepared memo to BMO re: [REDACTED] (1.1); Addressed issues re: [REDACTED] [REDACTED] prepared memo to BMO re: [REDACTED] (.9); Consideration of issues re: [REDACTED] prepared memo to BMO re: [REDACTED] (1.6).	3.60
02/24/15	JAF	Drafted response to motion to compel accounting filed by Elliot; instructions to SHM re: [REDACTED] (.5); Addressed issues re: [REDACTED] [REDACTED] (.1); Prepared email to Ben Brown re: IRA information and tax returns (.1).	0.70
02/25/15	BMO	Strategy conference with JAF re: [REDACTED] [REDACTED] (.3); conference with Peter Feaman and JAF re: [REDACTED] (.2).	0.50
02/25/15	CCL	Review and compile jewelry information for potential re-appraisal; correspond with Virginia Utley, JF, SHM	0.30
02/25/15	SHM	Conference with JAF (.4). Draft Re-N/Hearing. FInalize and serve/file.	0.80

02/25/15	JAF	Instructions to BL re: [REDACTED] (.3); Instructions to SHM re: [REDACTED] (.1); Strategy conference with BMO re: [REDACTED] (.3); Addressed issues re: [REDACTED] (.4); Instructions to SHM re: [REDACTED] (.3); Conference with Peter Feaman and BMO re: [REDACTED] (.2).	1.60
02/26/15	CCL	Case conference with JF; compile status information; categorizing documentgs	0.90
02/26/15	CCL	Review bookkeeping and tax issues with RBC	0.50
02/26/15	JAF	Conference with BL re: [REDACTED] (.1); Addressed issues re: [REDACTED] (.1); Addressed issues re: [REDACTED] (.2).	0.40
02/27/15	BMO	Receipt and review of Motion in Opposition to PR's Motion for Instructions and/or Motion to Compel Compliance with Court's Order Dated 9/18/14; Motion to Extend Time, filed 2/27/15 by Eliot Bernstein.	0.20
02/27/15	BMO	Receipt and review of Motion to Strike Motion for Instructions and/or Motion to Compel Compliance with Court's Order Dated 9/8/14; Motion to Extend Time to Compel Trust Accounting, etc. filed 2/27/15 by Eliot Bernstein.	0.20
02/27/15	SHM	Receipt of various filings by Eliot	0.50
02/27/15	JAF	Analysis of motion to strike filed by Elliot (.4); Correspondence with Illinois counsel re: [REDACTED] (.3).	0.70
03/02/15	BMO	Conference with JAF re: [REDACTED] (.2); conference with JAF and Eliot re: same and other issues (.7).	0.90



03/02/15	JAF	Conference with BMO re: [REDACTED] (.2); Conference with BMO and Elliot re: same and other issues (.7); Conference with Elliot re: same (.6); Addressed issues re: [REDACTED] (.5); Consideration of issues raised on [REDACTED] (.2).	2.20
03/03/15	BMO	Receipt and review of Re-Notice of Hearing for 3/5/15 filed 3/3/15 by Benjamin Brown.	0.10
03/03/15	ANG	Conference with JAF re: [REDACTED]	0.10
03/03/15	JAF	Considered issues re: [REDACTED] (.8); Conference with ANC re: [REDACTED] (.1); Conference with PA re [REDACTED] (.2).	1.10
03/03/15	MDL	Commence Draft of Petition to Inspect Tangible Personal Property (.9); Conference with JAF re: [REDACTED] to [REDACTED] (.2)	1.10
03/04/15	BMO	Receipt and review of Re-Notice of Hearing for 3/11/15 filed by Brown 3/4/15.	0.10
03/04/15	BMO	Call with Alan Rose re: hearings.	0.30
03/04/15	ANG	Review proposed discovery requests.	0.20
03/04/15	SHM	Prepare for hearing of 3/5/15	1.50
03/04/15	SHM	Conference with JAF. Revise proposed orders. Draft letter to Rose.	0.80
03/04/15	SHM	Draft N/Cancellation of Hearing. Finalize and file/serve.	0.50
03/04/15	JAF	Addressed issues re: [REDACTED] (.5); Reviewed orders on approval of settlement and order on payoff of mortgage, revisions to same; instructions to SHM re [REDACTED] (.8); Conference with Peter Feaman re: IRA issues (.2); Consideration of issues re: [REDACTED] (.3).	1.80
03/04/15	JAF	Review of and response to various correspondence re: hearing on SA and payoff of mortgage.	0.30

03/04/15	MDL	Draft Motion to Inspect and TAKE Possession (1.0); Draft Petition for Review of Compensation re: accountants (1.3)	2.30
03/05/15	BMO	Receipt and review of 3/5/15 Re-Notice of Hearing filed by Ben Brown 3/18/15.	0.10
03/05/15	JAF	Addressed issues re: [REDACTED]	0.30
03/05/15	JAF	Revisions to letter to Rose re: information on assets and liabilities of simon trust.	0.10
03/06/15	JAF	Phone conference with Walter Sahm attorney re: payoff of first mortgage (.2); Prepared memo to BMO re: [REDACTED] (.1).	0.30
03/09/15	BMO	Conference with JAF re: [REDACTED]	0.40
03/09/15	JAF	Addressed issues re: [REDACTED] (.2); Consideration of issues re: [REDACTED] (.1); Conference with Kevin Horan re: Illinois litigation (.3); Conference with BMO re: [REDACTED] (.4); Addressed issues re: [REDACTED] (.3).	1.30
03/10/15	BMO	Conference with JAF and Elliot and Candice Bernstein re: various issues of Simon Trust, settlement with Stansbury, Illinois litigation, payoff of mortgage with Sahm, etc. (2.0); Post-meeting strategy conference with JAF re: [REDACTED] (.2).	2.20
03/10/15	BMO	Telephone call to Peter Feaman re: trust issues.	0.20
03/10/15	JAF	Reviewed various issues raised by Elliot in preparation for meeting (.7); Addressed issues re: [REDACTED] (.2); Conference with BMO and Elliot and Candice Bernstein re: various issues of Simon Trust, settlement with Stansbury, Illinois litigation, payoff of mortgage with Sahm, etc. (2.0); Post-meeting strategy conference with BMO re: [REDACTED] (.2).	3.10

03/10/15	JAF	Addressed issues re: [REDACTED] [REDACTED] (.9); Prepared email to Eliot re: settlement agreement (.1).	1.00
03/11/15	JAF	Correspondence with Illinois counsel.	0.20
03/12/15	BMO	Strategy conference with JAF and Kevin Horan re: [REDACTED] (.8); post-meeting conference with JAF re: [REDACTED] (.1).	0.90
03/12/15	JAF	Addressed issues re: [REDACTED] (.2); Conference with RBC re: [REDACTED] (.2); Instructions to SHM re: [REDACTED] (.1); Strategy conference with BMO and Kevin HOran re: Illinois litigation (.8); Post-meeting conference with BMO re: [REDACTED] (.1); Reviewed potential death benefit information sent by Elliot (.3); Conference with Candice Bernstein (.1).	1.80
03/13/15	BMO	Conference with JAF re: [REDACTED]	0.10
03/13/15	BMO	Receipt and review of Notice of Hearing on Petition to Remove Theodore Bernstein, filed 3/13/15 by Eliot.	0.10
03/13/15	BMO	Receipt and review of 3/13/15 e-correspondence from Capeller with revised Payoff Letter attached.	0.10
03/13/15	BMO	Receipt and review of 3/13/15 e-correspondence from Eliot with attached letter from Heritage.	0.10
03/13/15	JAF	Instructions to SHM re: [REDACTED] (.2); Addressed issues re: [REDACTED] (.2); Correspondence with Elliot re: additional assets of decedent (.2).	0.60
03/13/15	JAF	Conference with BMO re: [REDACTED] [REDACTED]	0.10
03/16/15	JAF	Addressed issues re: [REDACTED] (.3); [REDACTED] (.3); Reviewed information from Elliot on IRA (.2).	0.50
03/17/15	BMO	Telephone call to Alan Rose re: pending issues and hearings.	0.20
03/17/15	SHM	Preparation of hearing on P/Discharge of AAL	0.10

03/18/15	BMO	Receipt and review of Response to Motion to Strike Sansbury's Objections to Accounting of Tescher & Spallina and/or to declare the Objections Aandoned, filed 3/18/15 by Feaman.	0.20
03/18/15	JAF	Addressed issues re: [REDACTED] [REDACTED] correspondence with RBC re: [REDACTED] (.4); Conference with SHM re: [REDACTED] (.1); Attended hearing on pet for discharge of admn ad litem (.6).	1.10
03/19/15	BMO	Receipt and review of Feaman 3/19/15 letter to BMO with proposed changes to Settlement Agreement.	0.10
03/19/15	JAF	Reviewed tax return of decedent; correspondence with RBC re: [REDACTED]	0.40
03/20/15	BMO	Receipt and review of e-correspondence from Eliot Bernstein with attached draft letter to Heritage Union Life Insurance Company.	0.20
03/20/15	JAF	Considered issues re: [REDACTED] [REDACTED] (.2); Reviewed letter and addressed issues re: email from Elliot re: life insurance and issues w sale of St Andrews home and PP (.3); Revisions to petition to take possession, inspect and appraise TPP; reviewed curators prior petition and order on same (.8); Revisions to petition for instr and review of compensation of accountant (.6).	1.90
03/20/15	MDL	Continued Draft of Petition for Instructions re: CBIZ Accounting Invoices	0.30
03/23/15	BMO	Receipt and review of Motion to Approve Trust Property and for Order Prohibiting Interference with Closing Including Discharging Lis Pendens, and Notice of Hearing re: same, filed 3/23/15 by Alan Rose.	0.30
03/23/15	BMO	Receipt and review of Notice of Hearing for 4/2/15, filed 3/23/15 by Eliot Bernstein.	0.30
03/23/15	BMO	Receipt and review of Notice of Lis Pendesn filed 3/21/15 by Eliot Bernstein.	0.10
03/23/15	ANG	Conference with JAF re: [REDACTED] [REDACTED]	0.20

03/23/15	ANG	Conference with JAF re: [REDACTED] [REDACTED]	0.10
03/23/15	JAF	Conference with ANC re: [REDACTED] [REDACTED] (.3); Addressed issues re: [REDACTED] (.6); Conference with Peter Feaman (.3).	1.20
03/23/15	JAF	Conference with Alan Rose re: [REDACTED] and TPP items (.3); Prepared memo to BMO re: [REDACTED] (.2); Addressed issues re: [REDACTED] and prep for hearing on same and petition re: TPP; revisions to mot TPP inspection storage appraisal (1.7); Conference with ANC re: [REDACTED] (.1).	2.30
03/23/15	MDL	Draft Petition to Inspect, Appraise and Take Possession of TPP	0.30

TOTAL

\$16,302.50

**LEGAL SERVICES SUMMARY**

ASHLEY GIROLAMO CRISPIN	2.70 Hrs	\$295/Hr	\$796.50
BRIAN M O'CONNELL	14.10 Hrs	\$350/Hr	\$4,935.00
BIDDY C LABUTKA	4.50 Hrs	\$125/Hr	\$562.50
JOY A FOGLIETTA	39.20 Hrs	\$205/Hr	\$8,036.00
MELISSA D LAZARCHICK	4.00 Hrs	\$265/Hr	\$1,060.00
SHERRI H MCDOWELL	7.30 Hrs	\$125/Hr	\$912.50
	<u>71.80 Hrs</u>		<u>\$16,302.50</u>

**COSTS ADVANCED**

Copy/Printing Expense

03/23/15	Copy/Printing Expense	2.40
	Total Copy/Printing Expense	2.40

Long Distance Telephone

03/23/15	Long Distance Telephone	4.34
	Total Long Distance Telephone	4.34

Court Reporter Costs

02/17/15	Pleasanton, Greenhill, Meek & Marsaa	275.00
02/17/15	Pleasanton, Greenhill, Meek & Marsaa	95.00
03/10/15	Pleasanton, Greenhill, Meek & Marsaa	275.00

	Total Court Reporter Costs	645.00
Other Cash Costs		
03/19/15	Verizon Conferencing	34.89
	Total Other Cash Costs	<u>34.89</u>
	TOTAL COSTS	<u>\$686.63</u>
	TOTAL THIS BILL	<u><u>\$16,989.13</u></u>