

## Marie Chandler

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**Subject:** FW: Case Nos. 502011CP000653, 502012CP004391, 502015CP00162, 502014CP003698, 502014CP002815XXXXNB-IJ  
**Attachments:** ABR to Judge Coates 06-09-15 re Bernstein Matters.pdf

**From:** Marie Chandler  
**Sent:** Tuesday, June 09, 2015 3:20 PM  
**To:** (Redacted)  
**Cc:** Alan Rose  
**Subject:** Case Nos. 502011CP000653, 502012CP004391, 502015CP00162, 502014CP003698, 502014CP002815XXXXNB-IJ

Dear Ms. Phillips:

Pursuant to your permission given to Mr. Rose, attached please find correspondence from Mr. Rose to Judge Coates.

cc: All parties on all service lists attached to letter.

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June 9, 2015

The Honorable Howard K. Coates, Jr.  
Room 2711  
3188 PGA Blvd  
Palm Beach Gardens, FL 33410

Re: *In Re: Estate of Simon L. Bernstein*  
*Case No.: 502012CP004391XXXXNB-IJ - Already Recused*

*In Re: Estate of Shirley Bernstein*  
*Case No. 502011CP000653XXXXNB-IJ*

*Eliot Bernstein, etc., et al. v. Theodore Stuart Bernstein, etc., et al.*  
*Case No. 502015CP001162XXXXNB-IJ*

*Ted Bernstein, etc., et al. v. Alexandra Bernstein, et al.*  
*Case No.: 502014CP003698XXXXNB-IJ*

*Oppenheimer Trust Company v. Eliot Bernstein, et al.*  
*Case No. 502014CP002815XXXXNB-IJ*

Dear Judge Coates:

I am writing in connection with the above five matters which were recently reassigned to your division after Judge Colin recused himself. As you will recall, the parties had a hearing before you last Thursday in the Estate of Simon Bernstein matter, and you recused yourself verbally and then entered an Order of Recusal and Reassignment.

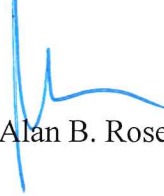
The parties believe that the recusal ruling would apply to all five cases, including the Oppenheimer case listed above. In that case, I have checked the counterclaim that was filed and confirmed that Proskauer Rose law firm is named as a counter defendant in a counterclaim filed by Eliot Bernstein.

I conferred with all parties to determine if we should advise you of this now or wait for the reassignment of the Simon Bernstein case, and both Mr. O'Connell, the Personal Representative, and several others have requested that we advise the Court now. I am providing a copy of this letter to all counsel and other interested persons on the attached service lists.

The Honorable Howard K. Coates, Jr.  
June 9, 2015  
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We thank Your Honor for your time and attention to this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "Alan B. Rose". The signature is stylized with a vertical line on the left and a horizontal line on the right.

Alan B. Rose

ABR/mbc

cc: All counsel and parties on service list via email only.

IN THE CIRCUIT COURT OF THE 15TH  
JUDICIAL CIRCUIT, IN AND FOR PALM  
BEACH COUNTY, FLORIDA

CASE NO. 502014CP002815XXXXSB

ELIOT AND CANDICE BERNSTEIN,  
  
IN THEIR CAPACITY AS PARENTS AND  
NATURAL GUARDIANS OF JOSHUA,  
JAKE AND DANIEL BERNSTEIN, MINORS,  
JURY TRIAL REQUESTED

HON. JEFFREY DANA GILLEN  
TRANSFERRED TO  
HON. MARTIN COLIN

Plaintiffs,

v.

OPPENHEIMER & CO. INC. AND ITS CURRENT AND FORMER DIVISIONS,  
AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS,  
SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS,  
DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS,  
REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
OPPENHEIMER TRUST COMPANY OF DELAWARE AND ITS CURRENT AND FORMER  
DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS,  
PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS,  
OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS,  
REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
LEGACY BANK OF FLORIDA AND ITS CURRENT AND FORMER DIVISIONS,  
AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS,  
SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS,  
DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS,  
REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
STANFORD FINANCIAL GROUP AND ITS CURRENT AND FORMER DIVISIONS,  
AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS,  
SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS,  
DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS,  
REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
JP MORGAN CHASE & CO. AND ITS CURRENT AND FORMER DIVISIONS,  
AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS,  
SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS,  
DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS,  
REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
JANET CRAIG, INDIVIDUALLY;  
JANET CRAIG, PROFESSIONALLY;  
HUNT WORTH, INDIVIDUALLY;

COUNTER COMPLAINT  
Wednesday, July 30, 2014  
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(CURRENTLY MISSING AND LEGALLY NONEXISTENT) AND ITS CURRENT ALLEGED AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
SIMON BERNSTEIN 2000 INSURANCE TRUST (DATED AUGUST 15, 2000) AND ITS CURRENT AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
SHIRLEY BERNSTEIN 2000 INSURANCE TRUST (DATED AUGUST 15, 2000) AND ITS CURRENT AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
THE 2000 LAST WILL AND TESTAMENT OF SIMON BERNSTEIN AND ITS CURRENT AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
THE 2000 LAST WILL AND TESTAMENT OF SHIRLEY BERNSTEIN AND ITS CURRENT AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
ALBERT GORTZ, ESQ. – PERSONALLY;  
ALBERT GORTZ, ESQ. – PROFESSIONALLY;  
PROSKAUER ROSE, LLP AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, ASSOCIATES, OF COUNSEL, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
MARITAL TRUST AND FAMILY TRUST CREATED BY SHIRLEY BERNSTEIN TRUST (2008) AND ITS CURRENT AND FORMER TRUSTEES, FIDUCIARIES AND COUNSEL;  
BERNSTEIN FAMILY REALTY, LLC AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
BERNSTEIN HOLDINGS, LLC AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
BERNSTEIN FAMILY INVESTMENTS, LLLP AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
LIFE INSURANCE CONCEPTS, INC. AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
LIC HOLDINGS, INC. AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES, SUBSIDIARIES, STOCKHOLDERS, PARENTS, PREDECESSORS, SUCCESSORS, ASSIGNORS, ASSIGNS, PARTNERS, MEMBERS, OFFICERS, DIRECTORS, TRUSTEES, EMPLOYEES, AGENTS, ADMINISTRATORS, REPRESENTATIVES, ATTORNEYS, INSURERS AND FIDUCIARIES;  
LIC HOLDINGS, LLC AND ITS CURRENT AND FORMER DIVISIONS, AFFILIATES,

**SERVICE LIST - CASE NO. 502012CP004391XXXXNBIJ**

Eliot Bernstein, individually  
and Eliot and Candice Bernstein,  
as Parents and Natural Guardians of  
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