

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

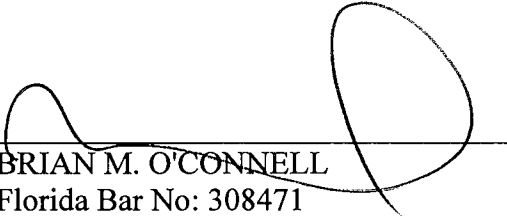
AMENDED NOTICE OF INTENT PURSUANT TO
FLA. R. CIV. P. 1.351

YOU ARE NOTIFIED that, after fifteen (15) days from the date of service, and if no objection is received from any party, the undersigned will issue the attached Subpoenas directed to:

AMERICAN GENERAL LIFE INSURANCE COMPANY
CRUMP LIFE INSURANCE SERVICES, INC.
FREUNDT & ASSOCIATES INSURANCE SERVICES, INC.
HARTFORD LIFE & ANNUITY INSURANCE COMPANY
RELIASTAR LIFE INSURANCE COMPANY
JOHN HANCOCK LIFE INSURANCE COMPANY
LINCOLN BENEFIT LIFE COMPANY
LINCOLN NATIONAL LIFE INSURANCE COMPANY
MASSACHUSETTS MUTUAL LIFE INSURANCE COMPANY
MUTUAL OF OHAMA INSURANCE COMPANY
PACIFIC LIFE INSURANCE COMPANY
PHOENIX LIFE INSURANCE COMPANY
SUMMIT ALLIANCE LECERAGED SOLUTIONS, LLC (f/k/a or a/k/a Summit Alliance
Financial, LLP)
DELAWARE LIFE INSURANCE COMPANY (f/k/a Sun Life Assurance Company of Canada
US)
TRANSAMERICA LIFE INSURANCE COMPANY
PENN MUTUAL LIFE INSURANCE COMPANY
LINCOLN FINANCIAL GROUP, INC.

to produce the items listed at the time and place specified in the attached subpoenas.

I HEREBY CERTIFY that a true and correct of the foregoing was sent by e-mail service or U.S. Postal Service on the 11 day of June, 2015 to the parties on the attached Service List.



BRIAN M. O'CONNELL
Florida Bar No: 308471
ASHLEY N. CRISPIN
Florida Bar No: 037495
MELISSA D. LAZARCHICK, ESQ.
Florida Bar No. 043696
Ciklin Lubitz & O'Connell
515 N. Flagler Dr., 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900
Facsimile: 561-833-4209
primary e-mail: service@ciklinlubitz.com
secondary e-mail: slobdell@ciklinlubitz.com

SERVICE LIST

<p>Alan B. Rose, Esq. Page, Mrachek, Fitzgerald & Rose, PA. 505 S. Flagler Dr., Suite 600 West Palm Beach, FL 33401 (561) 355-6991 arose@mrachek-law.com mchandler@mrachek-law.com Attorney for Ted S. Bernstein</p>	<p>John P. Morrissey, Esq. 330 Clematis St., Suite 213 West Palm Beach, FL 33401 john@jmorrisseylaw.com Attorney for Molly Simon et al</p>	<p>Donald R. Tescher, Esq. Robert L. Spallina, Esq. 925 S. Federal Highway, Suite 500 Boca Raton, FL 33432 Dtescher@tescherlaw.com ddustin@tescherlaw.com rspallina@tescherspallina.com kmoran@tescherspallina.com</p>
<p>Peter Feaman, Esq. Peter M. Feaman, P.A. 3695 Boynton Beach Blvd., Suite 9 Boynton Beach, FL 33436 pfeaman@feamanlaw.com</p>	<p>Shendell & Pollock, P.L. 2700 N. Military Trail, suite 150 Boca Raton, FL 33431 241-2323 Fax: 241-2330 Gary R. Shendell, Esq. gary@shendellpollock.com estella@shendellpollock.com grs@shendellpollock.com Kenneth S. Pollock, Esq. ken@shendellpollock.com britt@shendellpollock.com grs@shendellpollock.com 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. 34th St. Boca Raton, FL 33434 iviewit@iviewit.tv</p>	<p>Pamela Beth Simon 950 N. Michigan Ave., Apt. 2603 Chicago, IL 60611 psimon@stpcorp.com</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 Lisa@friedsteins.com Lisa.friedstein@gmail.com Beneficiary</p>
<p>Jill Iantoni and Julia Iantoni, a Minor c/o Guy and Jill Iantoni, her Parents & Natural Guardians 2101 Magnolia Lane Highland Park, IL 60035 jilliantoni@gmail.com</p>		

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
AMERICAN GENERAL LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:00 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for AMERICAN
GENERAL LIFE INSURANCE COMPANY, located at _____.

As Records Custodian, it is my duty to maintain the business records of the regular business of the above-
referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of AMERICAN GENERAL LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of AMERICAN GENERAL LIFE
INSURANCE COMPANY.

7. All of these records have been regularly maintained by AMERICAN GENERAL LIFE
INSURANCE COMPANY and have remained within the custody of AMERICAN GENERAL LIFE
INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
CRUMP LIFE INSURANCE SERVICES, INC.
c/o Registered Agent
CT Corporation System
1200 South Pine Island Road
Plantation, FL 33324

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:10 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for CRUMP LIFE INSURANCE SERVICES, INC., located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of CRUMP LIFE INSURANCE SERVICES, INC. pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of CRUMP LIFE INSURANCE SERVICES, INC..

7. All of these records have been regularly maintained by CRUMP LIFE INSURANCE SERVICES, INC. and have remained within the custody of CRUMP LIFE INSURANCE SERVICES, INC. from the time which they were created until the present date.

_____ /

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:
Notary Public, State of _____
My Commission No.: _____
My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
FREUNDT & ASSOCIATES INSURANCE SERVICES, INC.
c/o Registered Agent
Paracorp Incorporated
155 Office Plaza Drive, 1st Floor
Tallahassee, FL 32301

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:20 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for FREUNDT &
ASSOCIATES INSURANCE SERVICES, INC., located at _____.

As Records Custodian, it is my duty to maintain the business records of the regular business of the above-
referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of FREUNDT & ASSOCIATES INSURANCE SERVICES, INC. pertaining to Simon
Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of FREUNDT & ASSOCIATES
INSURANCE SERVICES, INC..

7. All of these records have been regularly maintained by FREUNDT & ASSOCIATES
INSURANCE SERVICES, INC. and have remained within the custody of FREUNDT & ASSOCIATES
INSURANCE SERVICES, INC. from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
HARTFORD LIFE AND ANNUITY INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:30 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for HARTFORD
LIFE AND ANNUITY INSURANCE COMPANY, located at _____.

As Records Custodian, it is my duty to maintain the business records of the regular business of the above-
referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of HARTFORD LIFE AND ANNUITY INSURANCE COMPANY pertaining to Simon
Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of HARTFORD LIFE AND ANNUITY
INSURANCE COMPANY.

7. All of these records have been regularly maintained by HARTFORD LIFE AND
ANNUITY INSURANCE COMPANY and have remained within the custody of HARTFORD LIFE
AND ANNUITY INSURANCE COMPANY from the time which they were created until the present
date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
RELIASTAR LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:40 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

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2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

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I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for RELIASTAR LIFE INSURANCE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of RELIASTAR LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of RELIASTAR LIFE INSURANCE COMPANY.

7. All of these records have been regularly maintained by RELIASTAR LIFE INSURANCE COMPANY and have remained within the custody of RELIASTAR LIFE INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
JOHN HANCOCK LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 10:50 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

_____/

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for JOHN HANCOCK LIFE INSURANCE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of JOHN HANCOCK LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of JOHN HANCOCK LIFE INSURANCE COMPANY.

7. All of these records have been regularly maintained by JOHN HANCOCK LIFE INSURANCE COMPANY and have remained within the custody of JOHN HANCOCK LIFE INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.: _____

My Commission Expires: _____

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
LINCOLN BENEFIT LIFE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:00 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for LINCOLN BENEFIT LIFE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of LINCOLN BENEFIT LIFE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of LINCOLN BENEFIT LIFE COMPANY.

7. All of these records have been regularly maintained by LINCOLN BENEFIT LIFE COMPANY and have remained within the custody of LINCOLN BENEFIT LIFE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
LINCOLN NATIONAL LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:10 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for LINCOLN NATIONAL LIFE INSURANCE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of WLINCOLN NATIONAL LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of LINCOLN NATIONAL LIFE INSURANCE COMPANY.

7. All of these records have been regularly maintained by LINCOLN NATIONAL LIFE INSURANCE COMPANY and have remained within the custody of LINCOLN NATIONAL LIFE INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
MASSACHUSETTS MUTUAL LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:20 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for
MASSACHUSETTS MUTUAL LIFE INSURANCE COMPANY, located at
_____. As Records Custodian, it is my duty to maintain the business
records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of MASSACHUSETTS MUTUAL LIFE INSURANCE COMPANY pertaining to Simon
Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of MASSACHUSETTS MUTUAL
LIFE INSURANCE COMPANY.

7. All of these records have been regularly maintained by MASSACHUSETTS MUTUAL
LIFE INSURANCE COMPANY and have remained within the custody of MASSACHUSETTS
MUTUAL LIFE INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
MUTUAL OF OMAHA INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:30 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for MUTUAL OF OMAHA INSURANCE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of MUTUAL OF OMAHA INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of MUTUAL OF OMAHA INSURANCE COMPANY.

7. All of these records have been regularly maintained by MUTUAL OF OMAHA INSURANCE COMPANY and have remained within the custody of MUTUAL OF OMAHA INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
PACIFIC LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:40 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

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You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

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If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for PACIFIC LIFE INSURANCE COMPANY, located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of PACIFIC LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of PACIFIC LIFE INSURANCE COMPANY.

7. All of these records have been regularly maintained by PACIFIC LIFE INSURANCE COMPANY and have remained within the custody of PACIFIC LIFE INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

_____ /

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
PHOENIX LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
c/o CT Corporation System
1200 South Pine Island Road
Plantation, FL 33324

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 11:50 AM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for PHOENIX LIFE
INSURANCE COMPANY, located at _____. As Records Custodian,
it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of PHOENIX LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of PHOENIX LIFE INSURANCE
COMPANY.

7. All of these records have been regularly maintained by PHOENIX LIFE INSURANCE
COMPANY and have remained within the custody of PHOENIX LIFE INSURANCE COMPANY from
the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.: _____

My Commission Expires: _____

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT
ALLIANCE FINANCIAL LLP)
c/o Registered Agent
CT Corporation System
1200 South Pine Island Road
Plantation, FL 33324

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ &
O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on
July 30, 2015, at 12:00 PM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or
control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the
years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income
paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007
through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to
surrender the original items. You may comply with this Subpoena by providing legible copies of
the items to be produced to the attorney whose name appears on this Subpoena on or before the
scheduled date of production. You may condition the preparation of copies upon the payment in

advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT ALLIANCE FINANCIAL LLP), located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT ALLIANCE FINANCIAL LLP) pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT ALLIANCE FINANCIAL LLP).

7. All of these records have been regularly maintained by SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT ALLIANCE FINANCIAL LLP) and have remained within the custody of SUMMIT ALLIANCE LEVERAGED SOLUTIONS, LLC (F/K/A OR A/K/A SUMMIT ALLIANCE FINANCIAL LLP) from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:
Notary Public, State of _____
My Commission No.: _____
My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE
COMPANY OF CANADA US)
c/o Registered Agent
Chief Financial Officer
200 E. Gaines Street
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 12:10 PM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

_____/

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE COMPANY OF CANADA US) , located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE COMPANY OF CANADA US) pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE COMPANY OF CANADA US) .

7. All of these records have been regularly maintained by DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE COMPANY OF CANADA US) and have remained within the custody of DELAWARE LIFE INSURANCE COMPANY (F/K/A SUN LIFE ASSURANCE COMPANY OF CANADA US) from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:
Notary Public, State of _____
My Commission No.: _____
My Commission Expires: _____

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
TRANSAMERICA LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
1200 South Pine Island Road
Plantation, FL 33324

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 12:20 PM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for
TRANSAMERICA LIFE INSURANCE COMPANY, located at
_____. As Records Custodian, it is my duty to maintain the business
records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of TRANSAMERICA LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of TRANSAMERICA LIFE
INSURANCE COMPANY.

7. All of these records have been regularly maintained by TRANSAMERICA LIFE
INSURANCE COMPANY and have remained within the custody of TRANSAMERICA LIFE
INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:

Notary Public, State of _____

My Commission No.:

My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
PENN MUTUAL LIFE INSURANCE COMPANY
c/o Registered Agent
Chief Financial Officer
200 E. Gaines St.
Tallahassee, FL 32399

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 12:30 PM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubitz.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for PENN
MUTUAL LIFE INSURANCE COMPANY, located at _____.

As Records Custodian, it is my duty to maintain the business records of the regular business of the above-
referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records
Custodian of PENN MUTUAL LIFE INSURANCE COMPANY pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were
printed out contained within computer files, hard drives, computer disks, if any, are being produced
herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts
of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of PENN MUTUAL LIFE
INSURANCE COMPANY.

7. All of these records have been regularly maintained by PENN MUTUAL LIFE
INSURANCE COMPANY and have remained within the custody of PENN MUTUAL LIFE
INSURANCE COMPANY from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:
Notary Public, State of _____
My Commission No.: _____
My Commission Expires:

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

IN RE: ESTATE OF:

PROBATE DIVISION

SIMON L. BERNSTEIN,

FILE NO: 502012CP4391XXXXNB/IJ

Deceased.

SUBPOENA DUCES TECUM WITHOUT DEPOSITION

THE STATE OF FLORIDA:

TO: RECORDS CUSTODIAN
LINCOLN FINANCIAL GROUP, INC.
c/o Registered Agent
Corporation Service Company
2711 Centerville Rd., Suite 400
Wilmington, DE 19808

YOU ARE COMMANDED to appear at the law offices of **CIKLIN LUBITZ & O'CONNELL, 515 North Flagler Drive, 20th Floor, West Palm Beach, Florida, 33401, on July 30, 2015, at 12:40 PM** and to have with you at that time and place the following:

All records pertaining to **SIMON BERNSTEIN**, which are in your care, custody or control including, but not limited to:

- 1. All checks and 1099(s) issued to Simon Bernstein or for his benefit for the years of 2007 through the present;**
- 2. All documents evidencing any renewal commission(s) and/or other income paid to Simon Bernstein, on behalf of Simon Bernstein or for his benefit for the years 2007 through the present.**

**Social security number: 371-32-5211 – Date of death 9/12/2012
Address: 7020 Lions Head Lane, Boca Raton, FL 33496**

These items will be inspected and may be copied at that time. You will not be required to surrender the original items. You may comply with this Subpoena by providing legible copies of the items to be produced to the attorney whose name appears on this Subpoena on or before the scheduled date of production. You may condition the preparation of copies upon the payment in advance of the reasonable cost of such preparation.

YOU MAY MAIL OR DELIVER THE COPIES TO THE ATTORNEY WHOSE NAME APPEARS ON THIS SUBPOENA AND THEREBY ELIMINATE YOUR APPEARANCE AT THE TIME AND PLACE SPECIFIED ABOVE.

You have the right to object to the production pursuant to this Subpoena at any time before production by giving written notice to the attorney whose name appears on this Subpoena.

THIS WILL NOT BE A DEPOSITION. NO TESTIMONY WILL BE TAKEN.

If you fail to:

1. Appear as specified; or
2. Furnish the records instead of appearing as provided above; or
3. Object to this subpoena,

you may be in contempt of court. You are subpoenaed to appear by the following attorney, and unless excused from this Subpoena by the undersigned attorney or the court, you shall respond to this subpoena as directed.

If you decide to mail or deliver the copies of requested documents, please review, sign and notarize the Affidavit of Document Authenticity enclosed herein and return it with the copied documents.

I hereby certify that all parties to this proceeding have received Notice of Intent to Issue the foregoing subpoena, and that no timely objection was raised by any party prior to its issuance.

MELISSA D. LAZARCHICK, ESQUIRE
For the Court

By: _____
MELISSA D. LAZARCHICK
Florida Bar No.: 043696

CIKLIN LUBITZ & O'CONNELL
BRIAN M. O'CONNELL, ESQ.
MELISSA D. LAZARCHICK, ESQ.
515 North Flagler Drive, 20th Floor
West Palm Beach, FL 33401
Telephone: 561-832-5900 Facsimile: 561-833-4209
service@ciklinlubitz.com
slobdell@ciklinlubit.com

AFFIDAVIT OF AUTHENTICITY

STATE OF _____
COUNTY OF _____

BEFORE ME, the undersigned authority, personally appeared _____,
who by me being first duly sworn, says to the best of his knowledge,

1. I _____ (*insert name*) am the Records Custodian for LINCOLN FINANCIAL GROUP, INC., located at _____. As Records Custodian, it is my duty to maintain the business records of the regular business of the above-referenced company.

2. I have received the Subpoena *Duces Tecum* Without Deposition served to Records Custodian of LINCOLN FINANCIAL GROUP, INC. pertaining to Simon Bernstein.

3. All of the records, including records existing in hard copy, and records which were printed out contained within computer files, hard drives, computer disks, if any, are being produced herewith and attached to this Affidavit of Authenticity as Composite Exhibit "A".

4. All of these records are original documents, or true and correct photocopies or printouts of the originals.

5. All of these records were created at or near the time indicated on the records.

6. All of the records are as regular business records of LINCOLN FINANCIAL GROUP, INC..

7. All of these records have been regularly maintained by LINCOLN FINANCIAL GROUP, INC. and have remained within the custody of LINCOLN FINANCIAL GROUP, INC. from the time which they were created until the present date.

8. All of these records are true, correct, complete, and authentic.

FURTHER AFFIANT SAYETH NAUGHT.

Dated the ____ day of _____, 2015.

The foregoing instrument was acknowledged before me this ____ day of _____, 2015 by _____, as _____, on behalf of the corporation. she/he is personally known to me or who has produced _____ (type of identification) as identification.

Print Name:
Notary Public, State of _____
My Commission No.: _____
My Commission Expires: _____