

3/12/08 Si Bernstein & Shily c/w

Fund Foundation
- S Corp. issue

House - JTT
Condo - Move to Shaley's name

Business:

- Volty Trust for Ted & Si w/ Bill as an ^{Successor} add'l trustee
- Buy - Sell for Ted
- If Ted predeceases Si, his shares go to Ted's kids & Bill.

Bill/Ted - discuss w/ Ted

Shily's doc. - leave \$100,000 to Matt (Ted's stepson)



BANKING

2/12/89

FUNDING

- Director
 - Dr. Scott Brown
 - Julie Landoni
 - Tracy Kates
 - Si: Stanley
 - Alexander Bernstein
- Si: Stanley to Fund of \$125k

- "S" Case to Funding??

- Reference

- Si: Was taking 3%

* - Bindon After - We receive funding determination letter

COMMO

- Transfer to Simon's New Trust

LLP

- Too: Plan out for Capital Purposes

COMPANIES

- Vance Trust - Buy as Successor Trustee

- Two PROPERTIES →

- Buy - Sell - Buy

* Buy Trust
of
Si:
Done

Mattias Logan

- ~~SP~~ ~~with~~ Spencer Capt in Trust

Fiorini Spencer

- Spencer Trust

To for Spencer

- Buy for Spencer

* No Spencer

1/21/08

BEANSTEIN

- Buy-Sell @ J's Death (Agreement on
- Value is \$10M (Cash Purchase)

- Voting Trust

- 33; 45 Shares Share of Trust

= J's Special Estate Plan (Asset Protection)

- UCP for J

- Decoding Asset Protection Trust

- Hours

- Look into Taxline on the
Properties

1/31/08 Bernstein, Si + Shirley

c/w Si, Ted
RUS, DRT

yes — Simple buy-sell:
Ted to have power to buy Si's
shares (1/3) for ~~8~~ X

Terms

- 1st redemption
- 2d Ted buyout
- 303
- 6166

no — GRAT

yes — Voting Trust

yes — Asset Protection
Delaware Asset Protection Trust

yes — FLP

Steve Greenwald

Penniston

12/19/07

- Spec of $\int \Sigma^3$ Spec PB for Σ^3
for Σ^3

- 21 Specs

- 12 Specs PB Penniston.

- Σ^3 : Σ^3 PB Specs PB

12/19/07 Bernstein

Sell $\frac{x}{100}\%$ to trust
put $\frac{y}{100}\%$ WYMERUT

Sy

Shares = 33%

~~sell
trust one
vote share~~

Grant's trust

Trusts
for other
kids

option to buy
purchase
shares

Ted

cap. the
price
estate tax values

Lisa
Jill
Elliot
Pema
Ted

—
—
—
Fwd'n

non-voting
shares
only } 7% - Lisa Trust
7% - Jill Trust
7% - Elliot Trust
12% Foundation/CRT ??

Seymour
Dr. Bernstein

11187.00 I

Lowry, List
Feb. Dr. B.
D/T

4/18/07

- Stanley Tables One OK } Part Book for
- IP for Fox Kids } Record from Lenny
- Foster View of Space
- New @C Parts
- 30M in loop

Assets

- 2.5M Paint
- 2.5M SY
- 1.0M SY
- 2.0M Paint
- 1.0M Stalot
- Misc. 2.5M
- CC -

Planning Man To St.

- Change Planning Hours in Contract @ Mr. Smith.
- \$ 150k/yr - List
- \$ 2M - Debt
- Best Common House

11/14/01

Sy & Shirley Bernstein

\$
10,000,000+

the company

- Pam
- Lisa
- Jill
- Elliott 3
- Feb - 3

S/H Agreement - Book value buy-out

2.5M Joint brokerage n/c

2.5M Sy

1.0M Sy

3.0M House J/T

1.07M MTG

1.0M net Condo - Shirley? - The Aragon

2.0M MISC

2.0M Life ins.

5.0M 33 Sh. of CO.

- CLAT? Mt. Sinai - M.B.

Boca Raton Community Hosp

- Patricia Berkes - wants to provide for her