

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

IN RE:

CASE NO. 502012CP004391XXXXNBIH

ESTATE OF SIMON L. BERNSTEIN,  
\_\_\_\_\_/

**MOTION TO DIRECT PAYMENTS FOR BENEFIT OF ELIOT'S CHILDREN TO  
COURT REGISTRY IN LIEU OF APPOINTING TRUSTEE; AND TO DETERMINE  
COMPENSATION FOR GUARDIAN AD LITEM AND DISCHARGE GUARDIAN**

Plaintiff, Ted S. Bernstein (the "Trustee"), as Successor Trustee, moves this Court to direct that all payments to or for the benefit of Elio Bernstein's children be paid into the Court Registry in lieu of appointment of a trustee to replace Eliot Bernstein. In addition, the Trustee seeks an order determining the final compensation and discharge for Guardian ad Litem (the "GAL"), and states:

1. There is pending a motion to approve a settlement in this Estate. In the related Shirley Bernstein case, there is an Order dated May 22, 2017, approving the same Settlement Agreement. The settlement resolved this trust construction action and all issues among the beneficiaries, namely the representatives of the ten trusts created upon the death of Simon Bernstein under the terms of his Amended and Restated Trust Agreement dated July 25, 2012.

2. The trustees of those trusts are four of the children of Simon Bernstein (with the sole exception of Eliot Bernstein), with Diana Lewis serving as GAL to look out for the best interests of Eliot's children.

3. As the Court will recall, by Order of Judge Phillips, it was determined that Eliot Bernstein's actions were adverse and destructive to his children's interest, which necessitated the appointment of a GAL. Essentially, the GAL is a surrogate for Eliot Bernstein as Trustee of the Eliot Children Trusts.

4. In paragraph 6 of the May 22, 2017 order, the Court indicated it would appoint a successor trustee upon the unanimous agreement of all persons concerned, or would appoint an independent person or entity to serve as trustee. There is the same need in this Estate for a replacement trustee if one could be found.

5. Despite multiple requests for input or discussion with Eliot Bernstein concerning this issue, he has refused to even discuss the matter. Trustee's counsel and the GAL have attempted to consult with Eliot and the Trustee hand-delivered through a process server a letter to Eliot's older children seeking input, communication, and suggestions as to Trustee. To date, there has been no response.

6. The undersigned also have conferred with a number of potential trustees and lawyers, including consultation with the Personal Representative and the GAL. It is now the collective belief of the parties involved in this matter that no one would serve as trustee of these trusts.

7. Oppenheimer, a large trust company which was serving as trustee for three other trusts created by Simon Bernstein for Eliot's children, became embroiled in years of litigation in this Court, connected indirectly to these cases, simply trying to resign and terminate the trust. In fact, the hearing to appoint Diana Lewis as Guardian Ad Litem in this matter was consolidated with the same hearing in the Oppenheimer case, and Diana Lewis was also appointed as Guardian Ad Litem for that matter.

8. The bottom line is that Oppenheimer could not find someone to replace it, and spent hundreds of thousands of dollars in years trying to extricate themselves from a relationship involving Eliot Bernstein. Neither Eliot nor Candace Bernstein would be capable of serving as trustee of these

trusts, given Judge Phillips' Order, and the fact that there has been absolutely no improvement in Eliot's litigation conduct.<sup>1</sup>

9. The undersigned submits to the Court that the only viable and appropriate solution is to deposit any funds for the benefit of Eliot's children into the Registry of the Court, under the conditions set forth below or such other conditions as this Court deems appropriate.

10. The undersigned, in consultation with the personal representative and the GAL, did not make this request lightly. This is made after considerable thought and effort was putting into finding a workable, and cost efficient solution. In addition, in light of the settlement among the beneficiaries, which resolves all issues between them, it is in the best interest of the children to find a self-executing solution to holding or managing these funds so that the GAL can be discharged and avoid further expense.

11. Under the terms of the testamentary trusts, upon obtaining the age of 25, each child was allowed to serve as co-trustee with his or her parent, or a suitable co-trustee. Upon obtaining the age of 25 and 30, partial distributions of principal were allowed, with the entire corpus being available upon each child reaching the age of 35.

12. Having considered the matter and discussed it with the GAL, the trustee suggests the following procedure:

- a. Any and all funds which would otherwise be paid into the Eliot Children's Trust, as defined in the settlement agreement, would instead be paid into the registry of the Court, separately, for the benefit of each of Eliot's three children;

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<sup>1</sup>Since the May 22 order, Eliot has been sanctioned by the Fourth District Court of Appeal and can no longer file *pro se* papers in that court, and he is subject to an order to show cause regarding contempt for his violation of prior orders regarding the guardian ad litem.

b. any Court-awarded fees to the GAL will be paid before the distribution of any funds into the Registry, the Court will enter an order directing the payment of those fees awarded by the Court directly to the GAL;

c. if at anytime one of the three children requests a distribution consistent with the terms of the trust, he could seek such distribution by filing a motion with the Court, and the Court would release such funds as are deemed appropriate, simply and efficiently;<sup>2</sup> and

d. upon each child reaching the age of 30, each such child would be entitled to the immediate release of all remaining funds held by the Clerk of the Court.

11. While there may be some fees charged by the Clerk of the Court, any such fees will be minimal in comparison to the cost of bringing in an attorney or corporate trustee to serve as trustee over these relatively modest trusts. Each trust will be funded with around \$100,000,<sup>3</sup> with the potential for more in the event there are funds left in Simon's estate after administrative expenses and payment of claims (which depends on the outcome of the Stansbury claim and the final administration of the Simon Bernstein estate). Given the time and expense involved in litigation with Eliot Bernstein, which would be virtually inevitable for any trustee willing to take this job, it

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<sup>2</sup>For example, if one of Eliot's children needs funds for college tuition, it would be very simple to file a motion seeking court approval to direct the clerk to issue a check to some university, college or technical school.

<sup>3</sup>The early termination of the trusts is not inconsistent with Simon's stated wishes. At the age of 30, each child is authorized to receive ½ of the trust corpus. If that happens, as it likely would, each trust would likely have less than \$50,000 (given the expected net distributions into each trust after the payment of GAL compensation). Article II.D of Simon's Trust permits the termination of any small trusts of \$50,000 or less to avoid administrative expenses. Thus, termination of the court-supervision at age 30, as suggested by the GAL, is logical and appropriate.

makes no economic sense to appoint a successor trustee. The fees and expenses of utilizing the Court registry would seem trivial in comparison to that.

12. As far as the timing, now that this Court has approved the settlement in the Illinois litigation and given the fact that Eliot Bernstein rejected his share – which means Eliot's share of the settlement will be paid to the Eliot Children's Trust under the terms of the now-approved Settlement Agreement, it is imperative that this issue be resolved soon so there is a place to make that payment.

13. Accordingly, and with the advice and consent of the GAL, the Trustee requests the Court direct that any and all payments for the benefit of and to be paid into the Eliot Children's Trust instead be paid to the Court Registry, which would eliminate the need and usefulness of the Eliot's Children Trust, which have never had a trustee and have yet to be funded.

14. In addition, upon entry of an order resolving the need for a new trustee, and the approval of all pending settlement agreements involving the GAL, the GAL should be discharged with the thanks of this Court, and her reasonable hourly rate and compensation should be determined.

15. Pursuant to previous orders, the fee for the GAL would be split equally between the three Eliot Children's Trust, and thereafter the GAL should be discharged.

WHEREFORE, for the reasons set forth above, the Trustee respectfully requests the Court grant the relief set forth above.

**CERTIFICATE OF SERVICE**

I CERTIFY that a copy of the foregoing has been furnished to parties listed on attached Service List by:  Facsimile **and**  U.S. Mail;  U.S. Mail;  Email Electronic Transmission;  FedEx;  Hand Delivery this 27th day of October, 2017.

MRACHEK, FITZGERALD, ROSE, KONOPKA,  
THOMAS & WEISS, P.A.  
505 South Flagler Drive, Suite 600  
West Palm Beach, FL 33401  
(561) 655-2250 Telephone / (561) 655-5537 Facsimile  
Email: [arose@mrachek-law.com](mailto:arose@mrachek-law.com)  
Secondary: [mchandler@mrachek-law.com](mailto:mchandler@mrachek-law.com)  
Attorneys for Ted S. Bernstein

By: /s/ Alan B. Rose  
Alan B. Rose (Fla. Bar No. 961825)

**SERVICE LIST** - CASE NO. 502012CP004391XXXXNBIH

Eliot Bernstein  
2753 NW 34th Street  
Boca Raton, FL 33434  
(561) 245-8588 - Telephone  
(561) 886-7628 - Cell  
(561) 245-8644 - Facsimile  
Email: Eliot I. Bernstein ([iviewit@iviewit.tv](mailto:iviewit@iviewit.tv))

John P. Morrissey, Esq.  
330 Clematis Street, Suite 213  
West Palm Beach, FL 33401  
(561) 833-0766 - Telephone  
(561) 833-0867 - Facsimile  
Email: John P. Morrissey  
([john@jmorrisseylaw.com](mailto:john@jmorrisseylaw.com))  
Counsel for Molly Simon, Alexandra Bernstein,  
Eric Bernstein, Michael Bernstein

Pamela Beth Simon  
303 E. Wacker Drive, Suite 2725  
Chicago, IL 60601  
Email: [psimon@stpcorp.com](mailto:psimon@stpcorp.com)

Lisa Friedstein  
2142 Churchill Lane  
Highland Park, IL 60035  
[lisa@friedsteins.com](mailto:lisa@friedsteins.com)  
Individually and as trustee for her children, and  
as natural guardian for M.F. and C.F., Minors

Jill Iantoni  
2101 Magnolia Lane  
Highland Park, IL 60035  
[jilliantoni@gmail.com](mailto:jilliantoni@gmail.com)  
Individually and as trustee for her children, and  
as natural guardian for J.I. a minor

Peter M. Feaman, Esq.  
Peter M. Feaman, P.A.  
3695 West Boynton Beach Blvd., Suite 9  
Boynton Beach, FL 33436  
(561) 734-5552 - Telephone  
(561) 734-5554 - Facsimile  
Email: [service@feamanlaw.com](mailto:service@feamanlaw.com);  
[mkoskey@feamanlaw.com](mailto:mkoskey@feamanlaw.com)  
Counsel for William Stansbury

Gary R. Shendell, Esq.  
Kenneth S. Pollock, Esq.  
Matthew A. Tornincasa, Esq.  
Shendell & Pollock, P.L.  
2700 N. Military Trail, Suite 150  
Boca Raton, FL 33431  
(561) 241-2323 - Telephone  
(561) 241-2330 - Facsimile  
Email: [gary@shendellpollock.com](mailto:gary@shendellpollock.com)  
[ken@shendellpollock.com](mailto:ken@shendellpollock.com);  
[matt@shendellpollock.com](mailto:matt@shendellpollock.com)  
[estella@shendellpollock.com](mailto:estella@shendellpollock.com)  
[britt@shendellpollock.com](mailto:britt@shendellpollock.com)  
[grs@shendellpollock.com](mailto:grs@shendellpollock.com)  
[robyne@shendellpollock.com](mailto:robyne@shendellpollock.com)

Diana Lewis, Esq.  
ADA & Mediations Services, LLC  
2765 Tecumseh Drive  
West Palm Beach, FL 33409  
(561) 758-3017 - Telephone  
Email: [dzlewis@aol.com](mailto:dzlewis@aol.com)  
Guardian *Ad Litem* for Eliot Bernstein's minor  
children, Jo.B., Ja.B., and D.B.

Brian M. O'Connell, Esq.  
Joielle A. Foglietta, Esq.  
Ciklin Lubitz Martens & O'Connell  
515 N. Flagler Dr., 20th Floor  
West Palm Beach, FL 33401  
561-832-5900 - Telephone  
561-833-4209 - Facsimile  
Email: [boconnell@ciklinlubitz.com](mailto:boconnell@ciklinlubitz.com);  
[jfoglietta@ciklinlubitz.com](mailto:jfoglietta@ciklinlubitz.com);  
[service@ciklinlubitz.com](mailto:service@ciklinlubitz.com);  
[slobdell@ciklinlubitz.com](mailto:slobdell@ciklinlubitz.com)