

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

IN RE:  
SHIRLEY BERNSTEIN TRUST  
Deceased

\_\_\_\_\_  
TED BERNSTEIN, AS TRUSTEE  
OF THE SHIRLEY BERNSTEIN TRUST  
AGREEMENT DATED MAY 20, 2008,  
AS AMENDED

PETITIONER,

v

ALEXANDRA BERNSTEIN; ERIC BERNSTEIN;  
MICHAEL BERNSTEIN; MOLLY SIMON;  
PAMELA B. SIMON, INDIVIDUALLY AND AS  
TRUSTEE F/B/O MOLLY SIMON UNDER THE  
SIMON L. BERNSTEIN TRUST DTD 9/13/12;  
ELIOT BERNSTEIN, INDIVIDUALLY,  
AS TRUSTEE F/B/O D.B., JA. B. AND JO. B.  
UNDER THE SIMON L. BERNSTEIN TRUST  
DTD 9/13/12, AND ON BEHALF OF HIS MINOR  
CHILDREN D.B., JA. B. AND JO. B.; JILL  
IANTONI, INDIVIDUALLY, AS TRUSTEE F/B/O  
J.I. UNDER THE SIMON L. BERNSTEIN TRUST  
DTD 9/13/12, AND ON BEHALF OF HER MINOR  
CHILD J.I.; MAX FRIEDSTEIN; LISA  
FRIEDSTEIN, INDIVIDUALLY, AS TRUSTEE  
F/B/O MAX FRIEDSTEIN AND C.F., UNDER  
THE SIMON L. BERNSTEIN TRUST DTD  
9/13/12, AND ON BEHALF OF HER  
MINOR CHILD, C.F.,

RESPONDENTS,  
\_\_\_\_\_ /

CASE NO.

50-2014-CP-003698-XXXX-NB

**Petitioner's Motion for Disbursement from the Court Registry to the Beneficiary**

Under penalties of perjury, Beneficiary and thus Petitioner Joshua Ennio Zander Bernstein ("Joshua") respectfully requests the Court to please allow disbursement of amounts deposited into the Court Registry for his benefit pursuant to the Court's December 6, 2017 Order that directed Petitioner Ted S. Bernstein ("Ted") to make direct payment into the Court Registry for the benefit of the children of Eliot I Bernstein ("Eliot") and, thus in support thereof, Joshua states as follows:

1 Joshua, born 08 27.1997 (Exhibit A), is now 21 and resides at 2753 NW 34th St  
Boca Raton, FL 33434.

2 Joshua has *full trust, faith and belief* in his personal attorney, NY Attorney Lalit K  
Jain Esq of 6122 Booth Street, Rego Park NY 113741034.

3 Joshua, filing and serving his petition as Pro Se Attorney-in-Fact, *has not retained*  
NY Attorney Lalit K Jain Esq for legal representation in his petition.

4 A total sum of \$ 146,751.12 ("Funds") for the benefit of Joshua has been duly  
deposited into the Court Registry as follows:

- .1 \$ 129,751.12 (\$ 60,000.00 and \$ 69,751.12) on August 1, 2018 (Exhibit B); and
- .2 \$ 17,000.00 on October 31, 2018 (Exhibit C).

5 Joshua, at least eighteen years of age, is entitled by law to the release of the Funds.

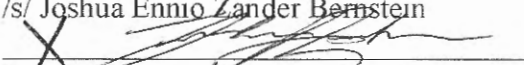
6 Joshua respectfully requests that the Funds, after deducting all official charges  
including charges for USPS Priority Mail Service, may please be disbursed by check favoring Lalit  
K Jain Esq, as Attorney FBO Joshua Bernstein and the check may please be mailed to him at his  
above address with a copy of the transmittal letter and the check to Joshua at his address below.

7 There are no other claims to the Funds other than this claim by the Petitioner.

WHEREFORE Petitioner respectfully prays that the Court please authorize and direct the  
Palm Beach County Clerk of Court to please mail the disbursement check as above to Attorney  
Lalit K. Jain Esq. FBO Joshua at his above address.

Dated: December 11, 2018

Respectfully Submitted by,  
/s/ Joshua Ennio Zander Bernstein

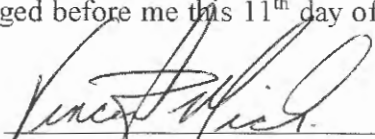
  
Petitioner Joshua Ennio Zander Bernstein  
Pro Se Attorney-in-Fact  
2753 NW 34th St  
Boca Raton, FL 33434  
561-886-7546  
Email: TeleNetJosh@GMail.Com

**Notary Acknowledgment**

State of Florida

County of Palm Beach

The foregoing instrument was acknowledged before me this 11<sup>th</sup> day of December, 2018 by Joshua Ennio Zander Bernstein.

  
\_\_\_\_\_  
Signature of Notary Public  
Print. Type/Stamp Name of Notary

~~Personally known:~~  
OR Produced Identification: FL. D.L. Exp. 02/27/2020  
Type of Identification: FL DL b652-425-97-307-0

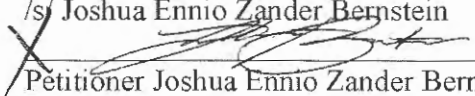


Vincent Miceli  
Notary Public  
State of Florida  
My Commission Expires 8/18/2020  
Commission No. GG 22638

**CERTIFICATE OF SERVICE**

I CERTIFY that a copy of the foregoing has been furnished to parties listed on attached Service List by E-mail Electronic Transmission and/or Court ECF this 11<sup>th</sup> day of December, 2018.

Dated: December 11, 2018

/s/ Joshua Ennio Zander Bernstein  
  
\_\_\_\_\_  
Petitioner Joshua Ennio Zander Bernstein  
Pro Se Attorney-in-Fact  
2753 NW 34th St  
Boca Raton, FL 33434  
561-886-7546  
Email: TeleNetJosh@GMail.Com

**SERVICE LIST**

CASE NO. 50-2014-CP-003698-XXXX-NB N

Original to Hon Court  
 205 N Dixie Hwy  
 West Palm Beach FL 33401  
 (561) 355-2431

Copies to all included in the Service List

<p>Robert L. Spallina, Esq.,                  Tescher &amp; Spallina, P.A.                  Wells Fargo Plaza                  925 South Federal Hwy Suite 500                  Boca Raton, Florida 33432                  rspallina@tescherspallina.com                  kmoran@tescherspallina.com                  ddustin@tescherspallina.com</p>	<p>Ted Bernstein                  880 Berkeley                  Boca Raton, FL 33487                  tbernstein@lifeinsuranceconcepts.com</p>	<p>John J. Pankauski, Esq.                  Pankauski Law Firm PLLC                  120 South Olive Avenue                  7th Floor                  West Palm Beach, FL 33401</p> <p>Pankauski Law Firm PLLC                  120 South Olive Avenue                  7th Floor                  West Palm Beach, FL 33401                  courtfilings@pankauskilawfirm.com                  john@pankauskilawfirm.com</p>
<p>Donald Tescher, Esq.,                  Tescher &amp; Spallina, P.A.                  Wells Fargo Plaza                  925 South Federal Hwy Suite 500                  Boca Raton, Florida 33432                  dtescher@tescherspallina.com                  ddustin@tescherspallina.com                  kmoran@tescherspallina.com</p>	<p>Ted Bernstein                  Life Insurance Concepts et al.                  950 Peninsula Corporate Circle                  Suite 3010                  Boca Raton, FL 33487  <a href="mailto:tbernstein@lifeinsuranceconcepts.com">tbernstein@lifeinsuranceconcepts.com</a></p>	<p>Pamela Beth Simon                  950 N. Michigan Avenue                  Apartment 2603                  Chicago, IL 60611  <a href="mailto:psimon@stpcorp.com">psimon@stpcorp.com</a></p>
<p>TESCHER &amp; SPALLINA, P.A.                  Wells Fargo Plaza                  925 South Federal Hwy Suite 500                  Boca Raton, Florida 33432                  dtescher@tescherspallina.com                  ddustin@tescherspallina.com                  kmoran@tescherspallina.com</p>	<p>Alan B. Rose, Esq.                  PAGE, MRACHEK, FITZGERALD,                  ROSE, KONOPKA, THOMAS &amp;                  WEISS, P.A.                  505 South Flagler Drive, Suite 600                  West Palm Beach, Florida 33401                  arose@pm-law.com                  and                  arose@mrachek-law.com</p>	<p>Pamela Simon                  President                  STP Enterprises, Inc.                  303 East Wacker Drive                  Suite 210                  Chicago IL 60601-5210                  psimon@stpcorp.com</p>

<p>Mark R. Manceri, Esq., and  Mark R. Manceri, P.A.,  2929 East Commercial Boulevard  Suite 702  Fort Lauderdale, FL 33308  mrmlaw@comcast.net  mrmlaw1@gmail.com</p>	<p>L. Louis Mrachek, Esq.  PAGE, MRACHEK, FITZGERALD,  ROSE, KONOPKA, THOMAS &amp;  WEISS, P.A.  S05 South Flagler Drive, Suite 600  West Palm Beach, Florida 33401  lmrachek@mrachek-law.com</p>	<p>Charles D. Rubin  Managing Partner  Gutter Chaves Josepher Rubin  Forman Fleisher Miller PA  Boca Corporate Center  2101 NW Corporate Blvd., Suite  107  Boca Raton, FL 33431-7343  crubin@floridatatax.com</p>
<p>Kimberly Moran  Tescher &amp; Spallina, P.A.  Wells Fargo Plaza  925 South Federal Hwy Suite 500  Boca Raton, Florida 33432  kmoran@tescherspallina.com</p>	<p>Lindsay Baxley aka Lindsay Giles  Life Insurance Concepts  950 Peninsula Corporate Circle  Suite 3010  Boca Raton, FL 33487  lindsay@lifeinsuranceconcepts.com</p>	<p>Estate of Simon Bernstein  Personal Representative  Brian M. O'Connell, Partner  Ciklin Lubitz Martens &amp; O'Connell  515 N Flagler Drive  20th Floor  West Palm Beach, FL 33401  boconnell@ciklinlubitz.com  jfoglietta@ciklinlubitz.com</p>
<p>Jill Iantoni  2101 Magnolia Lane  Highland Park, IL 60035  jilliantoni@gmail.com</p>	<p>Lisa Friedstein  2142 Churchill Lane  Highland Park, IL 60035  Lisa@friedsteins.com  lisa.friedstein@gmail.com  lisa@friedsteins.com</p>	

EXHIBIT A

STATE OF CALIFORNIA

CERTIFICATION OF VITAL RECORD

COUNTY OF ORANGE

CLERK-RECORDER

CERTIFICATE OF LIVE BIRTH  
STATE OF CALIFORNIA  
USE BLACK INK ONLY

1 199730 032132

STATE FILE NUMBER		LOCAL REGISTRATION DISTRICT AND CERTIFICATE NUMBER	
1A. NAME OF CHILD — FIRST (GIVEN) <b>JOSHUA</b>		1B. MIDDLE <b>ENNIO SANDER</b>	1C. LAST (FAMILY) <b>BERNSTEIN</b>
THIS CHILD 2. SEX <b>MALE</b>	9A. THIS BIRTH, SINGLE, TWIN, ETC. <b>SINGLE</b>	3B. IF MULTIPLE, THIS CHILD 1ST, 2ND, ETC. <b>-</b>	4A. DATE OF BIRTH — MM/DD/YYYY <b>08/27/1997</b>
5A. PLACE OF BIRTH — NAME OF HOSPITAL OR FACILITY <b>HOAG MEMORIAL HOSPITAL</b>		5B. STREET ADDRESS — STREET, NUMBER, OR LOCATION <b>ONE HOAG DRIVE</b>	
PLACE OF BIRTH 5C. CITY <b>NEWPORT BEACH</b>	6D. COUNTY <b>ORANGE</b>	6E. PLANNED PLACE OF BIRTH <b>HOSPITAL</b>	
FATHER OF CHILD 6A. NAME OF FATHER — FIRST (GIVEN) <b>ELIOT</b>	6B. MIDDLE <b>IVAN</b>	6C. LAST (FAMILY) <b>BERNSTEIN</b>	7. STATE OF BIRTH <b>IL</b>
8. DATE OF BIRTH <b>09/30/1963</b>	MOTHER OF CHILD 9A. NAME OF MOTHER — FIRST (GIVEN) <b>CANDICE</b>	9B. MIDDLE <b>MICHELLE</b>	9C. LAST (MAIDEN) <b>STOMP</b>
10. STATE OF BIRTH <b>CA</b>	11. DATE OF BIRTH <b>10/09/1972</b>	12A. PARENT OR OTHER INFORMANT — SIGNATURE <i>[Signature]</i>	12B. RELATIONSHIP TO CHILD <b>MOTHER</b>
12C. DATE SIGNED <b>08/28/1997</b>	13A. ATTENDANT OR CERTIFIER — SIGNATURE — DEGREE OR TITLE <i>Patricia Korber M.D.</i>	13B. LICENSE NUMBER <b>G-59224</b>	13C. DATE SIGNED <b>08/29/1997</b>
INFORMANT CERTIFICATION I CERTIFY THAT I HAVE REVIEWED THE STATED INFORMATION AND THAT IT IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.	CERTIFICATION OF BIRTH I CERTIFY THAT THE CHILD WAS BORN ALIVE AT THE DATE, HOUR AND PLACE STATED.	14. TYPED NAME AND TITLE OF CERTIFIER IF OTHER THAN ATTENDANT <b>P. KORBER, MD, 351 HOSPITAL RD., NB 92663</b>	14. TYPED NAME AND TITLE OF CERTIFIER IF OTHER THAN ATTENDANT
LOCAL REGISTRAR 15A. DATE OF DEATH	15B. STATE FILE NO. (STATE USE ONLY)	16. LOCAL REGISTRAR — SIGNATURE <i>[Signature]</i>	17. DATE ACCEPTED FOR REGISTRATION <b>09/09/1997</b>



CERTIFIED COPY OF VITAL RECORDS

STATE OF CALIFORNIA }  
COUNTY OF ORANGE } SS

DATE ISSUED **DEC 13 2010** *Tom Daly*

This is a true and exact reproduction of the document officially registered and placed on file in the office of the Orange County Clerk-Recorder.

TOM DALY  
CLERK-RECORDER  
ORANGE COUNTY, CALIFORNIA

This copy not valid unless prepared on engraved border displaying seal and signature of Clerk-Recorder.

ABN (REV 5/05)



EXHIBIT B





SHARON R. BOCK

**RECEIPT**

2781572

CLERK & COMPTROLLER  
PALM BEACH COUNTY, FLORIDA

Printed On:  
08/01/2018 02:43  
Page 1 of 1

Receipt Number: 2781572 - Date 08/01/2018 Time 2:43PM			
<b>Received of:</b>	SIMON LAW FIRM CLIENT TRUST ACCOUNT 303 E. WACKER DR STE 210 Chicago, IL 60601		
<b>Cashier Name:</b>	TLBrown	<b>Balance Owed:</b>	60,000.00
<b>Cashier Location:</b>	Main Branch Circuit Civil/Probate/ Marriage License	<b>Total Amount Paid:</b>	60,000.00
<b>Receipt ID:</b>	9033673	<b>Remaining Balance:</b>	0.00
<b>Division:</b>	IH: North Branch Probate, MH, Guardianship - IH(Civil)		
Case# 50-2014-CP-003698-XXXX-NB			
Item	Balance	Paid	Bal Remaining
Fees	60,000.00	60,000.00	0.00
<b>Case Total</b>	<b>60,000.00</b>	<b>60,000.00</b>	<b>0.00</b>
Payments			
Type	Ref#	Amount	
REGISTRY CHECK	2138	60,000.00	
<b>Total Received</b>		<b>60,000.00</b>	
<b>Total Paid</b>		<b>60,000.00</b>	

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Visit [www.mypalmbeachclerk.com](http://www.mypalmbeachclerk.com) or call (561) 355-2996.



SHARON R. BOCK

**RECEIPT**

2781586

CLERK & COMPTROLLER  
PALM BEACH COUNTY, FLORIDA

Printed On:  
08/01/2018 02:46  
Page 1 of 1

Receipt Number: 2781586 - Date 08/01/2018 Time 2:46PM			
<b>Received of:</b>	MRACHEK FITZGERALD ROSE KONOPKA THOMAS & WEISS PA 505 S FLSAGLER DR SUITE 600 West Palm Beach, FL 33401		
<b>Cashier Name:</b>	TLBrown	<b>Balance Owed:</b>	69,751.12
<b>Cashier Location:</b>	Main Branch Circuit Civil/Probate/ Marriage License	<b>Total Amount Paid:</b>	69,751.12
<b>Receipt ID:</b>	9033686	<b>Remaining Balance:</b>	0.00
<b>Division:</b>	IH: North Branch Probate, MH, Guardianship - IH(Civil)		
Case# 50-2014-CP-003698-XXXX-NB			
Item	Balance	Paid	Bal Remaining
Fees	69,751.12	69,751.12	0.00
<b>Case Total</b>	<b>69,751.12</b>	<b>69,751.12</b>	<b>0.00</b>
Payments			
Type	Ref#	Amount	
REGISTRY CHECK	10618	69,751.12	
<b>Total Received</b>		<b>69,751.12</b>	
<b>Total Paid</b>		<b>69,751.12</b>	

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EXHIBIT C



**SHARON R. BOCK**

**RECEIPT**

2903107

CLERK & COMPTROLLER  
PALM BEACH COUNTY, FLORIDA

Printed On:  
10/31/2018 12:01  
Page 1 of 1

Receipt Number: 2903107 - Date 10/31/2018 Time 12:01PM			
<b>Received of:</b>	SHIRLEY BERNSTEIN TRUST AGREEMENT ted bernstein trustee 880 berkeley street Boca Raton, FL 33487		
<b>Cashier Name:</b>	TLBrown	<b>Balance Owed:</b>	17,000.00
<b>Cashier Location:</b>	Main Branch Circuit Civil/Probate/ Marriage License	<b>Total Amount Paid:</b>	17,000.00
<b>Receipt ID:</b>	9161947	<b>Remaining Balance:</b>	0.00
<b>Division:</b>	IH: North Branch Probate, MH, Guardianship - IH(Civil)		
Case# 50-2014-CP-003698-XXXX-NB			
Item	Balance	Paid	Bal Remaining
Fees	17,000.00	17,000.00	0.00
<b>Case Total</b>	<b>17,000.00</b>	<b>17,000.00</b>	<b>0.00</b>
Payments			
Type	Ref#	Amount	
REGISTRY CHECK	440	17,000.00	
<b>Total Received</b>		<b>17,000.00</b>	
<b>Total Paid</b>		<b>17,000.00</b>	

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