

Report Selection Criteria

Case ID: 502010CP003128XXXXSB
Docket Start Date:
Docket Ending Date:

Case Description

Case ID: 502010CP003128XXXXSB
Case Caption: INRE JOSHUA Z BERNSTEIN IRREVOCABLE TRUST
Division: IY - COLIN
Filing Date: Wednesday, July 07th, 2010
Court: CP - PROBATE
Location: SB - SOUTH BRANCH
Jury: N-Non Jury
Type: TR - TRUST
Status: PE - PENDING

Related Cases

No related cases were found.

Case Event Schedule

No case events were found.

Case Parties

| Seq # | Assoc | Expn Date | Type | ID | Name | Aliases: | |
|-------|-------|-----------|------------|----------|---------------------|----------|------|
| 1 | | | IN RE | @2312344 | BERNSTEIN, JOSHUA Z | Aliases: | none |
| 2 | | | PETITIONER | @2312345 | BERNSTEIN, ELIOT | Aliases: | none |
| | | | | | | | |

| | | | | | | |
|---|---|--|------------|----------|--------------------------|---------------|
| 3 | | | PETITIONER | @2312346 | BERNSTEIN, CANDICE | Aliases: none |
| 4 | 2 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: none |
| 5 | 3 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: none |
| 6 | | | JUDGE | Y | COLIN, JUDGE MARTIN H | Aliases: none |

Docket Entries

| Docket Number | Docket Type | Book and Page No. | Attached To: |
|----------------------------|-----------------------------|-------------------|--------------|
| | 00000 - ADDITIONAL COMMENTS | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | 510FF - CPFF/TR | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | PE - PENDING | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | RCPT - RECEIPT FOR PAYMENT | | |

| | | | |
|----------------------------|---|--|--|
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | A Payment of -\$410.00 was made on receipt SBCV49660. | | |
| 1 | PET - PETITION | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | BERNSTEIN, CANDICE | | |
| Disposition Amount: | | | |
| Docket Text: | TO APPOINT SUCCESSOR TRUSTEE | | |
| 2 | ORD - ORDER | | |
| Filing Date: | 08-JUL-2010 | | |
| Filing Party: | COLIN, JUDGE MARTIN H | | |
| Disposition Amount: | | | |
| Docket Text: | FINAL ORD ON PET | | |

Report Selection Criteria

Case ID: 502010CP003123XXXXSB
Docket Start Date:
Docket Ending Date:

Case Description

Case ID: 502010CP003123XXXXSB
Case Caption: INRE DANIEL BERNSTEIN IRREVOCABLE TRUST
Division: IY - COLIN
Filing Date: Wednesday, July 07th, 2010
Court: CP - PROBATE
Location: SB - SOUTH BRANCH
Jury: N-Non Jury
Type: TR - TRUST
Status: PE - PENDING

Related Cases

No related cases were found.

Case Event Schedule

No case events were found.

Case Parties

| Seq # | Assoc | Expn Date | Type | ID | Name | Aliases: | |
|-------|-------|-----------|------------|--------------------------|--------------------|----------|------|
| 1 | | | IN RE | @2312297 | BERNSTEIN, DANIEL | Aliases: | none |
| 2 | | | PETITIONER | @2312298 | BERNSTEIN, ELIOT | Aliases: | none |
| 3 | | | PETITIONER | @2312298 | BERNSTEIN, CANDICE | Aliases: | none |

| | | | | | | | |
|---|---|--|----------|---------|--------------------------|----------|------|
| 4 | 2 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: | none |
| 5 | | | JUDGE | Y | COLIN, JUDGE MARTIN H | Aliases: | none |
| 6 | 3 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: | none |

Docket Entries

| Docket Number | Docket Type | Book and Page No. | Attached To: |
|----------------------------|-----------------------------|-------------------|--------------|
| | 00000 - ADDITIONAL COMMENTS | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | 510FF - CPFF/TR | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | PE - PENDING | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | RCPT - RECEIPT FOR PAYMENT | | |
| Filing Date: | 07-JUL-2010 | | |

| | | |
|----------------------------|-------------|---|
| Filing Party: | | |
| Disposition Amount: | | |
| Docket Text: | | A Payment of -\$410.00 was made on receipt SBCV49660. |
| 1 | ORD - ORDER | |
| Filing Date: | | 07-JUL-2010 |
| Filing Party: | | BERNSTEIN, ELIOT |
| Disposition Amount: | | |
| Docket Text: | | TO APPOINT SUCCESSOR TRUSTEE |
| 2 | ORD - ORDER | |
| Filing Date: | | 07-JUL-2010 |
| Filing Party: | | COLIN, JUDGE MARTIN H |
| Disposition Amount: | | |
| Docket Text: | | FINAL ORD ON PET |

Report Selection Criteria

Case ID: 502010CP003125XXXXSB
Docket Start Date:
Docket Ending Date:

Case Description

Case ID: 502010CP003125XXXXSB
Case Caption: IN RE JAKE BERNSTEIN IRREVOCABLE TRUST
Division: IY - COLIN
Filing Date: Wednesday, July 07th, 2010
Court: CP - PROBATE
Location: SB - SOUTH BRANCH
Jury: N-Non Jury
Type: TR - TRUST
Status: PE - PENDING

Related Cases

No related cases were found.

Case Event Schedule

No case events were found.

Case Parties

| Seq # | Assoc | Expn Date | Type | ID | Name | Aliases: | |
|-------|-------|-----------|------------|----------|--------------------|----------|------|
| 1 | | | IN RE | @2312319 | BERNSTEIN, JAKE | Aliases: | none |
| 2 | | | PETITIONER | @2312320 | BERNSTEIN, ELIOT | Aliases: | none |
| 3 | | | PETITIONER | @2312321 | BERNSTEIN, CANDICE | Aliases: | none |

| | | | | | | | |
|---|---|--|----------|---------|--------------------------|----------|------|
| 4 | 2 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: | none |
| 5 | 3 | | ATTORNEY | 0497381 | SPALLINA, ROBERT L | Aliases: | none |
| 6 | | | JUDGE | Y | COLIN, JUDGE MARTIN H | Aliases: | none |

Docket Entries

| Docket Number | Docket Type | Book and Page No. | Attached To: |
|----------------------------|-----------------------------|-------------------|--------------|
| | 00000 - ADDITIONAL COMMENTS | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | 510FF - CPFF/TR | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | PE - PENDING | | |
| Filing Date: | 07-JUL-2010 | | |
| Filing Party: | | | |
| Disposition Amount: | | | |
| Docket Text: | none. | | |
| | RCPT - RECEIPT FOR PAYMENT | | |
| Filing Date: | 07-JUL-2010 | | |

| | | |
|----------------------------|-------------|---|
| Filing Party: | | |
| Disposition Amount: | | |
| Docket Text: | | A Payment of -\$410.00 was made on receipt SBCV49660. |
| 1 | ORD - ORDER | |
| Filing Date: | | 07-JUL-2010 |
| Filing Party: | | BERNSTEIN, CANDICE |
| Disposition Amount: | | |
| Docket Text: | | TO APPOINT SUCCESSOR TRUSTEE |
| 2 | ORD - ORDER | |
| Filing Date: | | 08-JUL-2010 |
| Filing Party: | | COLIN, JUDGE MARTIN H |
| Disposition Amount: | | |
| Docket Text: | | FINAL ORD ON PET |

Christopher R. Prindle

Senior Vice President
Financial Advisor

February 6, 2008

Eliot & Candice Bernstein
39 Little Avenue
Red Bluff, CA 96080

Re: Bernstein Irrevocable Trusts

Dear Eliot & Candice,

It is our pleasure to inform you that Simon & Shirley Bernstein, have recently distributed \$120,000 to the Irrevocable Trust established for your children:

Josh Bernstein Irrevocable Trust
Jacob Bernstein Irrevocable Trust
Daniel Bernstein Irrevocable Trust

Stanford Trust Company will continue to serve as trustee. We wish you a happy and healthy 2008!

Sincerely,



Christopher R. Prindle, CFA
Senior Vice President
Investments

Stanford Group Company
MEMBER NASD/SIPC

5200 Town Center Circle, 6th Floor • Boca Raton, Florida 33486 USA
561.544.8200 • 561.544.8213 Direct • 561.544.8228 Fax
cprindle@stanfordeagle.com



November 20, 2007

Jake Bernstein
7020 Lions Head Lane
Boca Raton, Florida 33496

Re: Jake Bernstein Irrevocable Trust

Dear Jake,

It is our pleasure to inform you that your grandparents, Simon & Shirley Bernstein, have established a trust for your benefit. The trust was funded with six shares of LIC Holdings, Inc. which recently distributed \$17,073.86 to your trust.

Stanford Trust Company will serve as trustee. The trustee will invest and administer the funds in accordance with the terms of the trust. We wish you a very happy and safe holiday season.

Sincerely,

A handwritten signature in black ink, appearing to read "CR Prindle", written over the word "Sincerely,".

Christopher R. Prindle, CFA
Senior Vice President
Investments

Stanford Group Company
MEMBER NASD/SIPC

5200 Town Center Circle, 6th Floor • Boca Raton, Florida 33486 USA
561.544.8200 • 877.544.8230 Toll Free • 561.544.8228 Fax
www.stanfordeagle.com



November 20, 2007

Daniel Bernstein
7020 Lions Head Lane
Boca Raton, Florida 33496

Re: Daniel Bernstein Irrevocable Trust

Dear Daniel,

It is our pleasure to inform you that your grandparents, Simon & Shirley Bernstein, have established a trust for your benefit. The trust was funded with six shares of LIC Holdings, Inc. which recently distributed \$17,073.86 to your trust.

Stanford Trust Company will serve as trustee. The trustee will invest and administer the funds in accordance with the terms of the trust. We wish you a very happy and safe holiday season.

Sincerely,

A handwritten signature in black ink, appearing to read 'C. Prindle', written over the word 'Sincerely,'.

Christopher R. Prindle, CFA
Senior Vice President
Investments

Stanford Group Company
MEMBER NASD/SIPC

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www.stanfordeagle.com



November 20, 2007

Joshua Z. Bernstein
7020 Lions Head Lane
Boca Raton, Florida 33496

Re: Joshua Z. Bernstein Irrevocable Trust

Dear Joshua,

It is our pleasure to inform you that your grandparents, Simon & Shirley Bernstein, have established a trust for your benefit. The trust was funded with six shares of LIC Holdings, Inc. which recently distributed \$17,073.86 to your trust.

Stanford Trust Company will serve as trustee. The trustee will invest and administer the funds in accordance with the terms of the trust. We wish you a very happy and safe holiday season.

Sincerely,

A handwritten signature in black ink, appearing to read "Chris Prindle".

Christopher R. Prindle, CFA
Senior Vice President
Investments

Stanford Group Company
MEMBER NASD/SIPC

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