



MRACHEK
FITZGERALD
ROSE
KONOPKA
THOMAS
& WEISS, P.A.

Writer's Direct Dial: 561-355-6991
Writer's Email: arose@mrachek-law.com

VIA HAND-DELIVERY AT COURTHOUSE

June 4, 2015

Eliot I. Bernstein

John P. Morrissey

Re: *In Re: Estate of Shirley Bernstein*
Case No. 502011CP000653XXXXSB

In Re: Estate of Simon L. Bernstein
Case No.: 502012CP004391

Simon and Shirley Bernstein Documents

Gentlemen:

I have enclosed for each of you a CD disk containing certain documents relating to Simon's and Shirley's wills and trusts, and certain other documents, including color copies of certain original documents which I am holding. The documents I am holding are technically duplicate originals, with Tescher & Spallina holding the actual original documents, and with respect to the duplicate originals of the Trust Agreements, I tried to make high resolution color copies.

Included within this disk are the following documents in three folders:

Simon Bernstein 2000 Testamentary documents:

- 2000 Will
- First Codicil to Simon's 2000 Will
- 2000 Living Will
- 2000 Insurance Trust
- 2000 Durable Power Attorney
- 2000 Designation of Surrogate

Does from Lions Head per email

- First and last page of original Oppenheimer Trusts and first page of statements

(These are the first and last pages of three original signed Trusts, what now are the Oppenheimer trusts, and I copied the first and last pages only so you could view the signature pages, because these were stapled together at the top and I did not want to unstaple them. Complete copies of each of these three documents have been emailed to Eliot, and also are included in a separate folder entitled Complete Copies of Oppenheimer Trust Docs).

Eliot I. Bernstein
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Originals and copies of Trust and Will documents

For your convenience, I have put in one folder the relevant trust and estate documents, some of which came from Tescher & Spallina (these would be copies of documents they are holding) and some of which came from Simon's office (these include some original signed documents and some copies). There is some duplication between the folders on this disk.

The files in this folder are:

Shirley Bernstein Trust Agreement dated May 20, 2008

- Shirley Bernstein Trust Agreement (copy of the original being held by Tescher & Spallina)
- Shirley Bernstein Trust Agreement (duplicate original held by Simon)
- Shirley Bernstein Trust Agreement (second duplicate original held by Simon)

Shirley Bernstein Will dated 5/20/2008

- Shirley Bernstein Will – conformed copy (original is filed in courthouse)

Simon L. Bernstein Trust Agreement dated 5/20/2008

- Simon L. Bernstein Trust Agreement (2008) (duplicate original held by Simon)
- Simon L. Bernstein Trust Agreement (2008) (second duplicate original held by Simon)

Simon L. Bernstein Amended and Restated Trust Agreement dated 7/25/2012

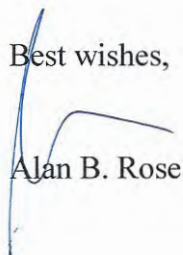
- Simon L. Bernstein Trust (2012) (copy of the original being held by Tescher & Spallina)
- Simon L. Bernstein Trust (2012) (duplicate original held by Simon)
- Simon L. Bernstein Trust (2012) (second duplicate original held by Simon)

Simon L. Bernstein Will dated 7/25/2012

- Simon L. Bernstein Will – conformed copy (original is filed in courthouse)

If you have any questions after review of the enclosed, please feel free to contact me at your convenience.

Best wishes,



Alan B. Rose