

Robert Spallina

From: Ted Bernstein [tbernstein@lifeinsuranceconcepts.com]
Sent: Wednesday, December 05, 2012 6:01 PM
To: Robert Spallina; Pam Simon
Cc: Simon David Scooter; Simon Pam
Subject: RE: Proceeds

OK Robert, we understand and I will distribute the document to each of my siblings this evening if I can get to it, otherwise tomorrow morning for sure.

From: Robert Spallina [mailto:rspallina@tescherspallina.com]
Sent: Wednesday, December 05, 2012 10:24 AM
To: Pam Simon
Cc: Ted Bernstein; Simon David Scooter; Simon Pam
Subject: RE: Proceeds

Eliot is represented and I can send nothing to him directly. If you all want to send it to him then by all means do so. Keep in mind that he is likely to send it to his attorney anyway. I will leave it to your discretion.

From: Pam Simon [mailto:pambsimon@icloud.com]
Sent: Wednesday, December 05, 2012 9:58 AM
To: Robert Spallina
Cc: Ted Bernstein; Simon David Scooter; Simon Pam
Subject: Re: Proceeds

Hi Robert Did you send to Eliot yet - prob a good start.

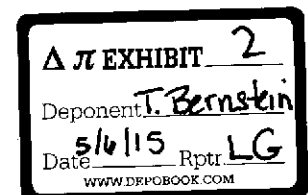
On Dec 3, 2012, at 1:35 PM, Robert Spallina <rspallina@tescherspallina.com> wrote:

Yes - but Eliot's counsel will probably hold things up

From: Pam Simon [mailto:pambsimon@icloud.com]
Sent: Monday, December 03, 2012 12:12 PM
To: Robert Spallina
Cc: Ted Bernstein; Simon David Scooter; Simon Pam
Subject: Re: Proceeds

Hi Robert - scooter will send you but can you send out for signatures? Thanks

On Dec 3, 2012, at 9:48 AM, Robert Spallina <rspallina@tescherspallina.com> wrote:



Please have him send me the document for my review and copy all. I want to make sure we have an agreement among all before I speak to the carrier.

From: Pam Simon [<mailto:pambsimon@icloud.com>]
Sent: Sunday, December 02, 2012 7:39 AM
To: Robert Spallina
Cc: Ted Bernstein; Simon David Scooter; Simon Pam
Subject: Re: Proceeds

Hi Robert - can you call Scooter as he has a copy of the document you can circulate for signatures to release the proceeds. 312-909-0369 Thx

On Nov 19, 2012, at 12:14 PM, "David (Scooter) Simon"
<dsimon@stpcorp.com> wrote:

May be available to achieve Si's intended results through waiver and settlement agreement.

Please have Mr. Spallina call my cell phone 312 909 0369

On Nov 19, 2012, at 1:11 PM, "Pam Simon"
<pambsimon@icloud.com> wrote:

Is the 2000 trust an irrevocable trust?

On Nov 19, 2012, at 11:57 AM, Robert Spallina
<rspallina@tescherspallina.com> wrote:

We are not responding to them with the document from 2000. We discussed that and you are carved out under that document. We need to find the 1995 trust ASAP

From: Pam Simon
[<mailto:pambsimon@icloud.com>]
Sent: Monday, November 19, 2012
12:56 PM
To: Ted Bernstein
Cc: Robert Spallina
Subject: Re: Proceeds

Pls send the executed trust document before u respond to heritage

On Nov 19, 2012, at 9:13 AM, Ted Bernstein
<tbernstein@lifeinsuranceconcepts.com> wrote:

Highly unlikely they will use another trust - what is SOP when doc can't be found?

Ted Bernstein
561-988-8984

Sent from my Samsung Galaxy Note™

----- Original message -----

Subject: RE: Proceeds
From: Robert Spallina <rspallina@tescherspallina.com>
To: Pam Simon <pambsimon@icloud.com>
CC: RE: Proceeds

Heritage responded back that they need a copy of the trust instrument. We do not have a copy and the only executed trust document that we have in which the policy is listed as an asset is the 2000 trust prepared by Al Gortz.

-----Original Message-----

From: Pam Simon
[\[mailto:pambsimon@icloud.com\]](mailto:pambsimon@icloud.com)
Sent: Friday,
November 16, 2012
2:35 PM
To: Robert Spallina
Cc: Bernstein Ted
Subject: Proceeds

Hi Robert - any word
on the proceeds ?
Need help? Pam