

3/12/08 Si Bernstein & Shirley c/w

Fund Foundation
- 5 Corp. issue

House - JT
Condo - move to Shirley's name

Business:

- Voting Trust for Ted & Si w/ Bill as an ^{Successor} add'l trustee
- Buy - Sell for Ted
- If Ted predeceases Si, his shares go to Ted's kids & Bill.

Bill/Ted - discuss w/ Ted

Shirley's doc. - leave \$100,000 to Matt (Ted's stepson)



TS003638

Benson

3/12/09

Farrington

- Dunlop
 - John Brown
 - John London
 - John Knott
 - St. Stanley
 - ALFRED BENTLEY
- St. Stanley to Farrington of \$125k
- 5th Corp to Farrington ??
 - Residence
 - St. Stanley 3%
- Benson Agree - We Receive Farrington Determination Letter

Comod

- Transfer to St. Stanley Now Trust

LECP

- Too Pay out for Current Purposes

Comparison

- Value Trust - Buy to Succession Trust
- Too Prospectus →
- Buy - Sell - Buy

* Buy Trust
Comod
St. Stanley
Dunlop

Mattias Logan

- ~~SP~~ ~~with~~ Spencer Cuff in Truck

Florence Spencer

- Spencer Truck
To for Spencer

- Bill for SP

* No Spencer

1-

1/31/08

BEINSTEIN

- Buy-Sell @ J's Death (Association or
- Value is \$10M (Cash Purchase)
- UGMA Trust
 - 33; 45 Shares Sister of Trust
- J's Sister Estate Plan (Asset Protection)
 - UGMA for J
 - Decoding Asset Protection Trust
- Home
 - Look into Title on the
Property

1/31/08 Bernstein, Si + Shirley

c/w Si, Ted
RUS, DRT

yes — Simple buy-sell:
Ted to have power to buy Si's
shares ('13) for ~~2~~ X

Terms

- 1st redemption
- 2d Ted buy out
- 303
- 6166

no — GRAT

yes — Voting Trust

yes — Asset Protection

Delaware Asset Protection Trust

yes — FLP

Steve Greenwald

17
PENNSYLVANIA

18
12/19/07

- Dept of $\int 2^3$ State PB for DOT
for TO

- 21 Shares

- 12 Shares PB Pennsylvania.

- TO: $\int 7$ PB Amer PB

12/19/07 Bernstein

sell ~~10%~~ 9% to trust
put ~~10%~~ 9% NUMERITT

Sy

Shares = 33%

~~Grant's trust
Lisa
Jill
Elliot
Pam
Ted~~

Grant's trust

Trusts
for other
kids

option to buy
purchase
Shares

Ted

cap. the
price @
estate tax values

Lisa
Jill
Elliot
Pam
Ted

-	non-voting shares only	7% - Lisa Trust
-		7% - Jill Trust
-		7% - Elliot Trust
Fund		12% Foundation/CRT ??

Seymour
J. Bernstein

11187.00 I

Lower, List
For B. Dr. O.
Drf

4/19/07

- Stanley Taxes Cont or } Part of Boston for
- IP for Fox Kiss } Revenue from taxes
- Fugate Value of Stock
- New @C Funds
- J 20M in Loof

- 200k like 200k
- 200k for 200k

Assets

- J - 2.5M Point
- J - 2.5M SY
- J - 1.0M SY
- Home - 2.0M Point
- Car - 1.0M Stock
- Misc - 2.0M
- CC -

Planning Memo To Sr.

- Change Planning Memo of Center
@ Mr. Smith.
- J 150k/yr - List
- J 2M - Debt
- Ben Cameron House

11/14/01

Sy = Shirley Bernstein

\$ 10,000,000+

The company

- Pam
- Lisa
- Jill
- Elliott 3
- Ted - 3

S/H Agreement - Book value buy-out

2.5M Joint brokerage n/c

2.5M Sy

1.0M Sy

3.0M House JTT

1.07M MTG

1.0M net Conto - Shirley? - The Aragon

2.0M misc

2.0M Life ins.

5.0M 33 Sh. of Co.

- CLAT? Mt. Sinai - M.B.
Boca Raton Community Hosp

- Patricia Becker - wants to provide Co. to ✓