

Robert Spallina

From: Robert Spallina
Sent: Tuesday, November 13, 2012 10:16 AM
To: 'Pam Simon'
Cc: Bernstein Ted; Kimberly Moran
Subject: RE: Update

No need for a status call. We will follow-up on the claims later this week and report back

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

From: Pam Simon [mailto:pambsimon@icloud.com]
Sent: Monday, November 12, 2012 9:05 PM
To: Robert Spallina
Cc: Bernstein Ted
Subject: Re: Update

hi robert - should we do a quick status call ? how is the insurance claim going? do you want our claims personnel to follow up? thanks pam

On Oct 19, 2012, at 5:32 AM, Pam Simon <pambsimon@me.com> wrote:

> Hi Robert - I have the ss4 on the 1995 irrevocable trust so we should be able to take care of getting the payment. If you already have the death claim package from the carrier can you overnight it to me and we will take care of the payout? If you don't have the package, can you send me an original death certificate and I will request it from the carrier?

> Also, we would like to do a family status call Tuesday at 11 am
> chicago time. Pls let us know if that works for you? Have a nice
> weekend - Pam Simon

>

> Thanks

> Pam

>

> On Oct 15, 2012, at 10:12 AM, Robert Spallina <rspallina@tescherspallina.com> wrote:

>

>> Call me now

>>

>> -----Original Message-----

>> From: Pam Simon [mailto:pambsimon@me.com]
>> Sent: Monday, October 15, 2012 11:11 AM
>> To: Robert Spallina
>> Subject: Re: Call 10/ 16/12 Tuesday 3:30 pm Chicago time

>>

>> I have some on the trust - should only be a few minutes

>>

>> On Oct 15, 2012, at 8:36 AM, Robert Spallina

>> <rspallina@tescherspallina.com> wrote:

>>

>>> There are no updates at this time

>>>

>>> Sent from my iPhone

>>>

>>> On Oct 15, 2012, at 8:40 AM, "Pam Simon" <pambsimon@me.com> wrote:

>>>

>>>> Hi all - do you have time for status?

Robert Spallina

From: Pam Simon [pambsimon@me.com]
Sent: Tuesday, October 30, 2012 1:15 PM
To: Robert Spallina
Cc: Bernstein Ted
Subject: Re: Simon Bernstein SS-4

No but we process death claims as part of our business. Thx

On Oct 30, 2012, at 6:50 AM, Robert Spallina <rspallina@tescherspallina.com> wrote:

Are you speaking to the carrier?

Sent from my iPhone

On Oct 29, 2012, at 9:00 PM, "Pam Simon" <pambsimon@me.com> wrote:

They said a few more weeks as of today - however the carrier doesn't care Thx

On Oct 29, 2012, at 3:33 PM, Robert Spallina <rspallina@tescherspallina.com> wrote:

The death certificates we have say pending investigation as to cause of death. Has this been cleared up?

From: Pam Simon [mailto:pambsimon@me.com]
Sent: Monday, October 29, 2012 9:57 AM
To: Robert Spallina; Bernstein Ted
Subject: Re: Simon Bernstein SS-4

Was the insurance claim filed yet? Do you need an original death certificate?

On Oct 28, 2012, at 6:40 AM, Pam Simon <psimon@stpcorp.com> wrote:

Begin forwarded message:

From: "Pam Simon"
<psimon@stpcorp.com>
Date: October 24, 2012, 2:58:46 PM
CDT
To: "Robert L. Spallina"
<rspallina@tescherspallina.com>
Cc: "Ted Bernstein"
<TBernstein@lifeinsuranceconcepts.com>

com>

Subject: Simon Bernstein SS-4

Dear Mr. Spallina,

Here is the SS-4 on the Simon Bernstein Irrevocable Insurance Trust dated 1995. The # is 65-6178916. I understand you have spoken with the Carrier and the proceeds are being paid out to the beneficiary as the Simon Bernstein Irrevocable Insurance Trust which I believe Ted Bernstein is getting the wire transfer instructions for the Carrier to send the proceeds to, as Trustee.

Thanks so much,

Pamela B. Simon

Pam Simon
STP Enterprises, Inc.
"A.L.P.S.™ (A.L.P.S.™ = Arbitrage Life Payment System)

The nation's only client-driven life insurance payment plan"
303 East Wacker Drive, Suite 210
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Direct: (312) 819-7474, ext. 414
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www.stpcorp.com

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Robert Spallina

From: Pam Simon [pambsimon@me.com]
Sent: Monday, October 29, 2012 9:00 PM
To: Robert Spallina
Cc: Bernstein Ted
Subject: Re: Simon Bernstein SS-4

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Date: October 24, 2012, 2:58:46 PM CDT
To: "Robert L. Spallina" <rspallina@tescherspallina.com>
Cc: "Ted Bernstein" <TBernstein@lifeinsuranceconcepts.com>
Subject: Simon Bernstein SS-4

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