

Robert Spallina

From: Ted Bernstein [tbernstein@lifeinsuranceconcepts.com]
Sent: Monday, March 04, 2013 10:14 AM
To: Robert Spallina
Subject: Re: Proceeds

How is after 4 today for quick call with sibs?

Ted Bernstein
561-988-8984

Sent from my Samsung Galaxy Note™

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

Subject: Re: Proceeds
From: Robert Spallina <rspallina@tescherspallina.com>
To: Ted Bernstein <tbernstein@lifeinsuranceconcepts.com>
CC: Re: Proceeds

I will reach out to you tomorrow.

Sent from my iPhone

On Mar 3, 2013, at 10:38 AM, "Ted Bernstein" <tbernstein@lifeinsuranceconcepts.com> wrote:

Robert,

I don't think any of us are thinking that you have taken too long. We realize what is causing delay.

Regarding where proceeds are paid, we cannot put them in jeopardy. It appears unwise to us to pay them to any receptacle connected to your firm. It is tempting fate. It impossible to predict all the things Eliot could allege so it seems prudent to separate them completely. We don't see any downside to directing them to an account unrelated to your firm.

It's probably a good idea to arrange a call with you and the 4 of us, Monday or Tuesday?

Ted
561-988-8984
tbernstein@lifeinsuranceconcepts.com

On Mar 1, 2013, at 5:49 PM, "Robert Spallina" <rspallina@tescherspallina.com> wrote:

We will be filing the declaratory action shortly. It needs approval from the carrier as does the judges order. There is no commingling issue and the delay rests with the missing trust and Eliot. We are almost there and Eliot is supposedly hiring

counsel for himself. As fast as everyone wants to move we will be on the courts schedule. We are almost there.

Sent from my iPhone

On Mar 1, 2013, at 1:56 PM, "Ted Bernstein"
<tbernstein@lifeinsuranceconcepts.com> wrote:

Robert?

From: Pam Simon [<mailto:pambsimon@icloud.com>]
Sent: Friday, March 01, 2013 11:18 AM
To: Ted Bernstein
Cc: Spallina Robert
Subject: Re: Proceeds

Theo- if Robert already has the 'form' approved by the carrier to file with the courts then why don't we just direct the proceeds to a lawyer outside of Roberts firm to avoid co-mingling. If Robert has not gotten this form, should we hire another attorney either in fla or illinois to get this done immediately. It has been nearly 6 months and there is too much at stake. What are your thoughts?

On Mar 1, 2013, at 8:23 AM, Ted Bernstein
<tbernstein@lifeinsuranceconcepts.com> wrote:

פנינה

I think this a point very well taken. We should not do anything that would have a remote chance of placing the life insurance proceeds in jeopardy. I have not received any kind of invoice from Robert's firm relating to the insurance policy or their work as estate reps. I am not sure what the billing procedure is and I agree that we should ask Robert to explain how they work so there are no misunderstandings.

I do think we should move as soon as possible at this point. There is no reason to delay this process and we should be pressing to get into court and get the document needed to pay those proceeds.

Ted

From: Pam Simon
[mailto:pambsimon@icloud.com]
Sent: Wednesday, February 27, 2013 7:04 AM
To: Ted Bernstein
Cc: Simon David Scooter
Subject: Proceeds

Theo- I've been thinking that maybe we should use another firm on Dad's life insurance proceeds as it seems Robert may have a difficult time with Eliot and other lawsuits in the mix getting this done. Maybe if we remove it entirely from the firm and separate it, it will be less likely to get caught up in what we see is happening. I think it was said that the insurance company is waiting for a court order and Robert is working on a draft to get pre-approved from the carrier first. Then Robert would file it in palm beach and then have the proceeds paid to his trust account. Again having the funds at that firm where they are executors of some of the estates makes me nervous as the money will be at the same firm as "creditors " and trouble makers having nothing to do with the proceeds.

Also, please get a bill from Robert up to this point - he had said he wasn't charging for the insurance stuff earlier but we should know where we stand at this point. Unless you having been paying his bills all along in your course of managing this nightmare, I think we need to know.

Talk to you soon,

משלו

Pam פנינה

Robert Spallina

From: Ted Bernstein [tbernstein@lifeinsuranceconcepts.com]
Sent: Wednesday, March 06, 2013 4:28 PM
To: Robert Spallina
Subject: call

Robert,

I am on call with Lisa, Jill, Pam and Scooter. It has been for the better part of 2 hours. They want me to send an email summarizing the concerns about the proceeds, the process, Eliot, etc. They are preparing it now and they will either send it to you or send it to me to. Scooter feels it should come from me since I will be the person you are representing. I am going to be in 2 meetings starting at 4. I won't be done until 7 or so. I think they are clarifying our understanding of our call today, your emails and procedure going forward.

Ted



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