

From: [Craig, Janet](#)
To: ["Eliot Ivan Bernstein"](#)
Subject: RE: Estimate from Mr Electric and Associates Inc (2)
Date: Thursday, December 6, 2012 9:36:33 AM
Attachments: [Bernstein FBO Daniel Agmt.pdf](#)
[Bernstein FBO Jake Agmt.pdf](#)
[Bernstein FBO Joshua Agmt.pdf](#)

Good morning, Eliot,

Up until your father passed, and even for some time after, we paid nothing from these trusts, so there is no "prior" way of handling these expenses. Going forward we will need a written request from you (an email is sufficient), outlining the reason for the expenses, the dollar amount to be paid and who it is to be paid to.

As requested, I have attached copies of the boys' trust agreements for your files.

We prefer to pay the vendor directly and NOT reimburse you. In this specific case, I will need you to explain in more detail why the work is being done. If it is to maintain the homeowner's insurance, we will not have a problem approving the request. When you schedule the work to be done, please let them know that the trust will pay the invoice upon receipt AND your confirmation that the work has been completed. If they require a down payment, that can be arranged as well.

Please feel free to call me if you have any questions.

Janet Craig, CTFA
Senior Vice President & Compliance Officer
Oppenheimer Trust Company
18 Columbia Turnpike
Florham Park, NJ 07932
Tel: 973-245-4635
Fax: 973-245-4699
Email: Janet.Craig@opco.com

From: Eliot Ivan Bernstein [<mailto:iviewit@gmail.com>]
Sent: Wednesday, December 05, 2012 8:46 PM
To: Craig, Janet
Subject: FW: Estimate from Mr Electric and Associates Inc (2)

Janet, Rachel had this scheduled for home maintenance, this is just the estimate but should I order the work now or not sure how you were working these expenses prior or how forward but let me know as this has to be done to get home owners ins I believe. Thanks, Eliot

From: Rachel Walker [<mailto:rachel3584@gmail.com>]
Sent: Wednesday, December 05, 2012 6:10 PM
To: Janet Craig; Candice Candy Bernstein; Eliot Ivan Bernstein; Eliot Bernstein
Subject: Fwd: Estimate from Mr Electric and Associates Inc (2)

The estimate from Junior... We need to schedule this ASAP
Call me if you need anything

:)

Sent from my iPhone

Begin forwarded message:

From: Mr Electric and Associates Inc 2 <jr1@mrelec.com>
Date: December 5, 2012, 3:35:01 PM EST
To: rachel3584@gmail.com
Subject: Estimate from Mr Electric and Associates Inc (2)
Reply-To: Mr Electric and Associates Inc 2 <jr1@mrelec.com>

Dear Customer :

Please review the attached estimate. Feel free to contact us if you have any questions.

We look forward to working with you.

Sincerely,
Densmore Daniels
Mr Electric and Associates Inc
Phone - 954-792-6710
Fax - 954-792-6710

To view your estimate

Open the attached PDF file. You must have [Acrobat® Reader®](#) installed to view the attachment.

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