

04/28/17	BMO	Prepare for and attend telephone call with Jim Stamos.	0.60	
04/28/17	CAA	Receive and review email from Trish Roth with P. Feaman re: proposed Order Setting Hearing on 6/2/17 on Stansbury's Motion for Discharge from Further Responsibility for Funding of the Estate Participation in the Chicago Life Insurance Litigation, and for Assumption of Responsibility by the Estate and for Reimbursement of Advanced Funds (DE #448); profile proposed Order in system	0.40	PP A D
04/28/17	CAA	Receive, review profile in system and consider action to be taken re: JP Morgan's March 2017 E/O Simon IRA (Acct 8004) statement, and letter from JP Norgan re: new set of industry regulations for retirement and other qualified accounts scheduled to go into effect April 2017; prepare and send email to B. O'Connell re: [REDACTED]	<u>0.60</u>	PP A D
04/29/17	BMO	Receipt and review of 4/29/17 12:08 pm email from Alan Rose re: Bernstein insurance mediation.	0.10	
05/01/17	BMO	Receipt and review of Notice of Unavailability filed 5/1/17 by Peter Feaman in 502012CA013933.	0.10	
05/02/17	JAF	Memorandum to CA re [REDACTED]	0.20	
05/03/17	BMO	Receipt and review of JAF 5/3/17 9:57 am email to Alan Rose requesting copies of tax returns for the Simon Trust from 2012 forward.	0.10	PR
05/03/17	BMO	Receipt and review of JAF 5/3/17 9:58 am email re: [REDACTED]	0.10	PR
05/03/17	BMO	Receipt and review of CAA 5/3/17 1:04 pm email to James Stamos re: Hearing on Stansbury's Motion for Discharge from Further Responsibility.	0.10	PR

- 05/03/17 CAA Receive and review email from J. Foglietta re: [REDACTED]; review file; telephone conference with J. Foglietta re: [REDACTED]; prepare Memo to File re: [REDACTED]; review IRS website and print forms to request Forms 1041s and 1040s for Estate and individual tax returns for Simon Bernstein; extended telephone conferences with IRS re: same; update Memo to File re: [REDACTED]; begin completion of Form 56 (change PR from Tescher & Spallina
- 05/03/17 CAA Receive, review profile in system and consider action to be taken re: 4/27/17 Order Denying Stansbury's Motion to Vacate and Denying Motion to Disqualify for Inappropriate Jurisdiction, Alternatively, Denying on its Merits, and Order Denying Appointment of Ted Bernstein as Administrator Ad Litem;
- 05/03/17 CAA Receive, review profile in system and consider action to be taken re: Trustee's (Ted Bernstein) 4/28/17 Motion for Entry of Standing Order Governing Hearings
- 05/03/17 CAA Receive, review profile in system and consider action to be taken re: 4/28/17 Order (by Senior Judge, Roger Colton) Denying Eliot Bernstein, as Beneficiary of the Estate of Simon Bernstein with Standing, and an Interested Person Under Law (D.E. #541) - deeming it an omnibus motion for rehearing on several orders previously entered by the court
- 05/03/17 CAA Receive, review profile in system and consider action to be taken re: P. Feaman's 5/1/17 letter to Judge Scher and proposed Order Setting Hearing on 6/2/17 on Stansbury's Motion for Discharge from Further Responsibility re: Illinois federal action; prepare and send email to J. Stamos advising when date hearing set

4.00 PP A D
1.0 UT U

0.20 PP A D

0.10 PP A D

0.20 PP A D

0.40 PP A D

05/03/17	CAA	Receive, review profile in system and consider action to be taken re: Peter Feaman's proposed Order setting hearing for 8/18/17 (1 full day reserved) on Successor Trustee's Motion to Ratify Appointment as Successor Trustee (D.E. #473)	0.20 A PP D
05/03/17	JAF	Considered [REDACTED] and prepared memorandum to CA re [REDACTED]	0.30
05/04/17	BMO	Receipt and review of CAA 5/4/17 1:25 pm email to Alan Rose re: extension of time.	0.10 PR
05/04/17	BMO	Receipt and review of CAA 5/4/17 2:36 pm email to Mudrick Reporting re: depo transcript of BMO on 3/13/17, 1:00 pm.	0.10 PR
05/04/17	BMO	Receipt and review of CAA 5/4/17 4:11 pm email memo re: [REDACTED]	0.10 PR
05/04/17	BMO	Receipt and review of email from Alan Rose re: setting hearing on Motion to Approve Settlement for 5/18/18 UMC.	0.10
05/04/17	BMO	Receipt and review of 5/4/17 5:20 pm email from Trish Roth with attached Feaman correspondence to Judge Scher of 5/4/17 with proposed Order setting hearing for 8/18/17.	0.10 PR
05/04/17	BMO	Receipt and review of 5/4/17 correspondence from Feaman to Court with proposed Order Setting Hearing for 8/18/17 at 10:00 a.m. (all day).	0.10
05/04/17	CAA	Prepare and send email to J. Foglietta attaching [REDACTED] [REDACTED] prepare IRS Form 8821 and Form 4506-T to obtain Simon Bernstein's 1040 tax returns;	0.30 UT U
05/04/17	CAA	Receive email from J. Foglietta re: [REDACTED] [REDACTED]; calculate new extended date; prepare and send email to A. Rose re: same	0.30 D PP A

05/04/17	CAA	Receive and review email from J. Foglietta re: [REDACTED]; telephone conference with Lisa at Mudrick Reporting re: same; prepare and send email to Mudrick Court Reporting ordering transcript; receive, review and profile in system, deposition transcript of B. O'Connell; receive and review email from Mudrick Reporting attaching invoice for same; arrange for payment	0.60 D PP A
05/04/17	CAA	Receive, review profile in system and consider action to be taken re: 4th DCA's 4/27/17 Opinion affirming lower court's ruling re: 4D16-0222 by May, Klingensmith and Kuntz	0.10 D PP A
05/04/17	CAA	Receive, review profile in system and consider action to be taken re: 4th DCA's 4/27/17 Order granting in part E. Bernstein's 4/12/17 Motion for Additional Reasonable Extension-Stay-Continuance Based on Newly Discovered Evidence and New Hearings in the Lower Tribunal," giving Appellant 7 days to file Initial Brief, and denying Appellee's Motion to Dismiss and Impose Non-Monetary Sanctions Against Appellant re: 4D16-3314	0.20 D PP A
05/05/17	BMO	Receipt and review of JAF 5/5/17 1:10 pm email to Alan Rose re: our request for another extension of time to set PR's objections to Rose's client's trust accounting for the Simon Trust.	0.10 PR
05/05/17	BMO	Receipt and review of CAA 5/5/17 1:32 pm email to Marie Chandler re: request for extension of time.	0.10 PR
05/05/17	BMO	Receipt and review of 5/5/17 2:11 pm email from Alan Rose agreeing to our request for extension of time.	0.10
05/05/17	BMO	Receipt and review of 5/5/17 4:07 pm email from Trish Roth re: Stansbury - scheduling a Motion Calendar Hearing on Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust.	0.10 PR

05/05/17	BMO	Receipt and review of CAA 5/5/17 4:38 pm emamil memo re: [REDACTED] [REDACTED]	0.10 PR
05/05/17	BMO	Receipt and review of 5/5/17 5:09 pm email from Eliot Bernstein with attached Service of Initial Brief of the Merits filed by Eliot in 4th DCA 16-3314 on 5/5/17.	0.50
05/05/17	BMO	Receipt and review of 5/5/17 5:17 pm email from Eliot Bernstein with attached service of Appellant's MOTion to Accept Late Filing of Initial Brief, 4th DCA 16-3314.	0.10
05/05/17	BMO	Receipt and review of 5/5/17 4:25 pm email from Alan Rose re: Stansbury matter, Motion Calendar Hearing.	0.10
05/05/17	BMO	Receipt and review of 5/5/17 5:29 pm email with attached efilng confirmation of Motion to Accept Onde Day Late Initial Brief, 4th DCA Case 16-3314.	0.10 PR
05/05/17	BMO	Receipt and review of 5/5/17 5:30 pm email from Alan Rose to Eliot Bernstein responding to Eliot's filing in 4th DCA Case 16-3314.	0.10
05/05/17	BMO	Receipt and review of 5/5/17 6:53 pm email from Eliot Bernstein with attached e-service of Amended Appellant's Initial Brief, Amended to Correct Table of Citations for Initial Brief on the Merits, filed 5/5/17 with 4th DCA.	0.10
05/05/17	BMO	Receipt and review of Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted as Successor Trustee of Trust, Which is Sole Beneficiary of This Estate, filed 5/5/17 by Peter Feaman.	0.10
05/05/17	CAA	Receive and review email from A. Rose re: agreement to extend time for us to set Ted Bernstein's objections to	0.10 PP A D

05/05/17 CAA Receive and review email from Trish Roth at P. Feaman's office and response email from A. Rose re: Feaman wanting to schedule hearing on Motion for Summary Judgment Denying Ted Bernstein's Mot to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust; prepare and send email to B. O'Connell and J. Foglietta re: same

~~0.10~~ PP A D

05/05/17 CAA Meet with J. Foglietta re: [REDACTED]
[REDACTED]

~~0.10~~ D

05/08/17 BMO Receipt and review of email from Susan Johnson with attached 5/8/17 correspondence from Peter Feaman and Motion for Summary Judgment on Ted's Motion to Ratify.

~~0.10~~ PR

05/08/17 BMO Receipt and review of Notice of Hearing for 5/18/17, filed 5/8/17 by Alan Rose.

0.10

05/08/17 BMO Receipt and review of Notice of Hearing for 6/1/17, filed 5/8/17 by Alan Rose.

0.10

05/08/17 CAA Receive, review profile in system and consider action to be taken re: E. Bernstein's 5/5/17 Initial Brief filed in 4D16-3314 (E. Bernstein v. Ted Bernstein), E. Bernstein's Motion to Accept Late Filing ("Less than One Day Late"), E. Bernstein's Supplemental App0endix re: 5/5/17 Initial Brief and E. Bernstein's "Amended to Correct Table of Citations to Initial Brief"

~~0.20~~ PP A D

05/08/17 CAA Receive, review profile in system and consider action to be taken re: invoice from Pleasanton & Marsaa re: re: reporting of 4/27/17 hearing; arrange for payment of same

~~0.10~~ PP A D

05/08/17 CAA Receive, review profile in system and consider action to be taken re: P. Feaman's Notice of Unavailability filed in Stansbury v. Estate of Simon, et al, 2012CA13933 action

~~0.10~~ PP A D

05/08/17	CAA	Receive, review profile in system and consider action to be taken re: Stansbury's Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted S. Bernstein as Successor Trustee of Trust, Which is Sole Beneficiary of this Estate	0.10 A PP D
05/08/17	CAA	Receive, review profile in system and consider action to be taken re: April 2017 JP Morgan statement for Acct. No. 5220	0.10 A PP D
05/08/17	CAA	Receive, review profile in system and consider action to be taken re: P. Feaman's 5/4/17 letter to Judge Scher re: proposed Order Setting Hearing on 8/18/17	0.20 A PP D
05/09/17	BMO	Receipt and review of Amended Notice of Hearing (Estate of Simon Bernstein) for 5/18/17, filed 5/9/17 by Alan Rose.	0.10
05/09/17	BMO	Receipt and review of Amended Notice of Hearing (Shirley Bernstein Trust), for 5/18/17, filed 5/9/16 by Alan Rose.	0.10 D PR
05/09/17	CAA	Complete preparing IRS forms to obtain Simon Bernstein's 1040 tax returns and for Estate of Simon's 1041 tax returns; prepare and send Certified letter to IRS re: original signed Form 56 (switching over Fiduciary from Tescher and Spallina to B. O'Connell, as Successor PR (to obtain 1041s); prepare and send Fax to IRS re: Forms 8821 and 4506-T (1040s);	2.80
05/09/17	CAA	Begin Index of all documents in our possession received from Tescher & Spallina	1.70 A PP
05/09/17	CAA	Receive, review profile in system and consider action to be taken re: A. Rose's Notice of Hearing for Status Conference on 6/1/17 re: Stansbury v. Estate of Simon, et al	0.10 A PP

05/09/17	CAA	Receive, review profile in system and consider action to be taken re: Ted Bernstein's Notice of Hearing for 5/18/17 on Trustee's Motion to Approve Compromise and Settlement, Appoint Trustee for Trusts, etc., and Determine Compensation for Guardian Ad Litem, and for Status Conference to Schedule Additional Hearings; prepare and send email to Marie Chandler with A. Rose re: clarifying courtroom reflected in notice for Judge Scher	0.20 A PP D
05/10/17	CAA	Prepare and send fax (third attempt) to IRS re: Forms 8821 and 4506-T re: 1040s for Simon Bernstein; multiple telephone conferences with IRS re: Form 8821; prepare and send multiple faxes	0.70 A PP D
05/10/17	CAA	Receive and review email from Trish Roth with Peter Feaman's office re: availability on 6/6/17 or 6/8/17 on Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust, etc.	0.10 A PP D
05/10/17	CAA	Receive, review profile in system and consider action to be taken re: JP Morgan IRS statement (Acct. 8004) for April 2017	0.10 A PP D
05/10/17	CAA	Receive, review profile in system and consider action to be taken re: Ted Bernstein's Amended Notice of Hearing for 5/18/17 on Ted's Motion to Approve Compromise Settlement; Appoint Trustee; and Determine Compensation for Guardian Ad Litem, and Status Conf to Schedule Additional Hearings re: Ted v. Alexandra Bernstein, et al (2014CP003698); telephone conference with M. Chandler at A. Rose's office re: same; Receive, review profile in system and consider action to be taken re: two additional Notices of Hearings on same matter in Estate of Simon and E/O Shirley actions	0.30 A PP D
05/11/17	BMO	Receipt and review of Response to Trustee's Motion for Approval of Settlement Agreement, filed 5/11/17 by Peter Feaman.	0.10

05/11/17	BMO	Receipt and review of 5/11/17 10:56 pm Alan Rose email to Peter Feaman re: Feaman 5/11/17 filing of Response to Trustee's Motion for Approval of Settlement Agreement.	0.10	
05/11/17	BMO	Receipt and review of 5/11/17 6:38 pm email from Ted Bernstein re: Bernstein insurance mediation.	0.10	
05/11/17	CAA	Complete attachment to Form 8821 for C. Anderson to have authority to receive 1040 tax returns for Simon L. Bernstein per instructions from IRS; update Memo to file re: same; extended telephone conferences with IRS re: same; fax Form 8821 with attachments; receive, review and profile in system multiple faxes from IRS re: 1040s for years 2008 through 2012; prepare and send email to J. Foglietta re: same	1.70 1.3	PR A UT
05/11/17	CAA	Receive, review profile in system and consider action to be taken re: Stansbury's 5/11/17 Response to Trustee's Motion for Approval of Settlement Agreement	0.20	D PP A
05/11/17	CAA	Receive, review profile in system and consider action to be taken re: P. Feaman's 5/11/17 letter to Judge Scher re: Response to Trustee's Motion for Approval of Settlement Agreement	<u>0.10</u>	D PP A
05/12/17	BMO	Receipt and review of CAA 5/12/17 3:31 pm email re: [REDACTED]	0.10	PR
05/12/17	BMO	Receipt and review of JAF 5/12/17 10:05 pm email to Alan Rose re: tangible personal property.	0.10	PR
05/12/17	BMO	Receipt and review of 5/12/17 9:19 am email from Ted Bernstein re: Rose latest filing, status of getting mediation in matter.	0.10	
05/12/17	BMO	Receipt and review of 5/12/17 3:08 pm Alan Rose email to Ted Bernstein and Ron Alvarez re: Bernstein insurance mediation.	0.10	
05/12/17	BMO	Receipt and review of 5/12/17 3:21 pm email from Ted Bernstein re: Bernstein insurance mediation.	0.10	

05/12/17	BMO	Receipt and review of JAF 5/12/17 5:10 pm email memo re: [REDACTED]	0.10	PR
05/12/17	BMO	Receipt and review of JAF 5/12/17 5:16 pm email re: [REDACTED]	0.10	PR
05/12/17	CAA	Receive and review email from J. Foglietta to A. Rose re: selling TPP through auctioneers	0.10	D
05/12/17	CAA	Review calendar re: P. Feaman's request to set UMC hearing for 6/6/17 or 6/8/17 on Stansbury's Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust; prepare and send email to J. Foglietta re: same; prepare and send response email to Trish Roth with P. Feaman re: availability on 6/6/17	0.40	D PP A
05/12/17	CAA	Meet and discuss with J. Foglietta re: [REDACTED]; review, scan and profile in system the transcripts; review IRS website re: obtaining actual 1040 tax returns, including Schedules filed therewith	1.20	D PP A
05/13/17	BMO	Receipt and review of 5/13/17 11:00 am email from Alan Rose re: Eliot's Motion for Extension of Time to File a Motion for Rehearing, Clarification, Written Opinion, and Certification.	0.10	
05/15/17	BMO	Receipt and review of Appellee's, Ted Bernstein, as Successor Trustee, Response to Appellant's Motion for Extension of Time to File Rule 9.330 Motion After Per Curiam Affirmance, filed 5/15/17 in 4th DCA by Alan Rose (Case 4D16-222).	0.10	
05/15/17	BMO	Receipt and review of Motion for Extension of Time: Rehearing of 4/27/17 Order, filed 5/13/17 by Eliot Bernstein.	0.10	
05/15/17	BMO	Receipt and review of Motion for Extension of Time: Rehearing of 4/28/17 Order, filed 5/15/17 by Eliot Bernstein.	0.10	PR
05/15/17	BMO	Receipt and review of CAA 5/15/17 8:15 am email memo re: [REDACTED]	0.10	PR

05/15/17	BMO	Receipt and review of 5/15/17 10:48 am Alan Rose email to Peter Feaman re: transcript on 4/27/17 hearing on Eliot's 1.540 Motion.	0.10	
05/15/17	BMO	Receipt and review of CAA 5/15/17 10:21 am email memo re: [REDACTED] [REDACTED]	0.10	PR
05/15/17	BMO	Receipt and review of CAA 5/15/17 3:28 pm email memo re: [REDACTED] [REDACTED]	0.10	PR
05/15/17	BMO	Receipt and review of 5/15/17 10:32 am email from Judge Alvarez.	0.10	
05/15/17	CAA	Receive and review multiple emails from J. Foglietta re: [REDACTED] [REDACTED] review calendar to coordinate rescheduling of telephone conference with A. Alvarez for week of 5/15/17; discuss same with J. Foglietta; telephone conferences with Judge Alvarez to schedule same; prepare and send email to B. O'Connell re: [REDACTED] [REDACTED] [REDACTED]	0.70	PP A D
05/15/17	CAA	Receive and review email from P. Feaman's office (Maryann Koskey) re: whether or not we ordered a court reporter for the 4/27/17 hearing on Stansbury's Motion Requesting Special SEt Hearing on Stansbury's Motion to be Relieved of Further Responsibility from Funding the Illinois action; review file;	0.10	PP A D
05/15/17	CAA	Receive and review email from Mediator, Ron Alvarez, to B. O'Connell re: steps needed to proceed to schedule mediation	0.10	PP A D
05/15/17	CAA	Review file; prepare and send email to B. O'Connell re: [REDACTED] [REDACTED]	0.20	PP A D
05/15/17	CAA	Receive, review, profile in system and consider action to be taken re: P. Feaman's 5/8/17 letter to B. O'Connell rel: Stansbury's Motion for Summary Judgment	0.10	PP A D

05/16/17	BMO	Receipt and review of Notice of Hearing for 6/15/17 on MSJ Denying Ted's M/Ratify and Confirm Appointment of TSB as Successor Trustee of Trust, etc., filed 5/16/17 by Peter Feaman.	0.10
05/16/17	BMO	Receipt and review of 5/16/17 8:46 am email to Eliot re: hearing on Eliot's motion.	0.10
05/16/17	BMO	Receipt and review of 5/16/17 10:57 am email from Adam Simon to Judge Alvarez.	0.10
05/16/17	BMO	Receipt and review of 5/16/17 11:02 am email from Diana Lewis re: hearing date on Stansbury's Motion of Creditor for Discharge from Further Responsibility, etc.	0.10
05/16/17	BMO	Receipt and review of JAF 5/16/17 11:05 am email memo re: [REDACTED]	0.10 PR
05/16/17	BMO	Receipt and review of 5/16/17 11:09 am email from Alan Rose re: scheduling of mediation.	0.10 PR
05/16/17	BMO	Prepare 5/16/1 4:31 pm email to Judge Alvarez re: mediation.	0.10
05/16/17	BMO	Receipt and review of 5/16/17 3:33 pm email from Judge Alvarez re: mediation.	0.10
05/16/17	BMO	Receipt and review of 5/16/17 3:55 pm email memo from JAF re: [REDACTED]	0.10 PR
05/16/17	BMO	Receipt and review of CAA 5/16/17 3:59 pm email to Mr. Simon re: mediation.	0.10 PR
05/16/17	BMO	Prepare 5/16/17 4:32 pm email memo to JAF re: [REDACTED]	0.10 PR
05/16/17	BMO	Prepare 5/16/17 4:32 pm email to Judge Alvarez.	0.10
05/16/17	CAA	Receive and review 138-page fax from IRS re: 1040 Wage and Income transcripts for January 2008 through May 14, 2008 re: Simon Bernstein	0.20
05/16/17	CAA	Discussions with J. Foglietta re: [REDACTED]	0.30 D

05/16/17	CAA	Receive and review email from J. Foglietta re: [REDACTED]; prepare and send email to Judge Scher's judicial assistant re: B. O'Connell available on 9/13/17 and 10/4/17	<u>0.20</u> D PP A
05/16/17	CAA	Receive and review email from attorney Adam Simon (counsel for Simon Bernstein Insurance Trust) to mediator Ron Alvarez re: scheduling telephone mediation in Illinois federal action; telephone conference with Matrix Mediation to obtain dates; review calendar; discuss dates given with J. Foglietta; prepare and send email to A. Simon re: 6/1/17 for mediation	<u>0.90</u> D PP A
05/16/17	CAA	Receive voicemail (forwarded by H. Graboyes) from Susan Johnson with P. Feaman's office re: whether or not we ordered court reporter for 4/27/17 hearing; review file; prepare and send email to Susan Johnson re: same	<u>0.10</u> D PP A
05/16/17	CAA	Receive, review profile in system and consider action to be taken re: E. Bernstein's 5/12/17 Motion for Extension of Time to File a Motion for Rehearing, Clarification, Written Opinion, and Certification Under Florida Rules of Appellate Procedure 9.330(s) and for the Court to Set the Time re: E. Bernstein v. Ted Bernstein, et al (4D16-0222)	<u>0.10</u> D PP A
05/16/17	CAA	Receive, review profile in system and consider action to be taken re: E. Bernstein's 5/13/17 Motion for Extension of Time: Rehearing of April 27, 2017 Order filed in Estate of Simon action	<u>0.10</u> D PP A
05/16/17	CAA	Receive, review profile in system and consider action to be taken re: Appellee's (Ted Bernstein) 5/15/17 Response to Appellant's Motion for Extension of Time to File Rule 9.330 Motion After Per Curiam Affirmance re: E. Bernstein v. Ted Bernstein, et al (4D16-0222)	<u>0.10</u> D PPA

05/16/17	JAF	Instructions to CA re [REDACTED] [REDACTED]	0.20	
05/16/17	JAF	Memo to BMO re [REDACTED] [REDACTED]	0.30	
05/16/17	JAF	Consideration of preliminary information needed for mediation on Illinois lawsuit.	0.20	
05/17/17	BMO	Receipt and review of 5/17/17 10:07 am email from Adam Simon re: mediation, Simon Bernstein Irrev. Ins. Trust v. Heritage Ins., Estate of Simon Bernstein, et al.	0.10	
05/17/17	BMO	Receipt and review of 5/17/17 4:25 pm email from Adam Simon.	0.10	
05/17/17	BMO	Receipt and review of JAF 5/17/17 4:26 pm email to Alan Rose re: Exhibit A (Term Sheet) to T & S Mediation Settlement Agreement.	0.10	PR
05/17/17	BMO	Receipt and review of CAA 5/17/17 4:33 pm email to Adam Simon.	0.10	PR
05/17/17	BMO	Receipt and review of 5/17/17 email from Alan Rose with proposed Orders he will submit at 5/18/17 hearing.	0.10	
05/17/17	BMO	Receipt and review of JAF email memo re: [REDACTED]	0.20	
05/17/17	BMO	Receipt and review of 5/17/17 5:07 pm email from Marie Chandler on behalf of Alan Rose with attached proposed orders Rose intends to submit at 5/18/17 hearings.	0.10	
05/17/17	CAA	Receive and review email from attorney Adam Simon re: telephone mediation in Illinois federal action for 6/1/17; receive and review email from mediator Ron Alvarez to Adam Simon re: agreement from opposing counsel to him as mediator, to have telephone mediation and agreement to pay portion of mediation fees; telephone conference with A. Simon re: same; phone conference with Matrix re: mediator's hourly rate; send email to A. Simon re: same	0.80	D PP A

05/17/17	CAA	Receive and review Adam Simon's draft email to Judge Alvarez re: confirmation and clarification of telephone mediation relating to the Illinois federal action; prepare and send email to B. O'Connell and J. Foglietta re: [REDACTED] [REDACTED] prepare and send pemail to A. Simon re: same	0.20 A PP D
05/17/17	CAA	Prepare hearing folder on Ted Bernstein's Motion to Approve Compromise Settlement, Appt Trustee for Trusts, Determine Comopensation of Guardian Ad Litem, and for Status Conference to Schedule Additional Hearings; meet and discuss same with J. Foglietta; phone conference with A. Rose's office re: need Term Sheet (Exh A) to T&S Mediation Settlement Agreement; draft proposed blank Order; receive, review and profile in system, Term Sheet	3.70
05/17/17	CAA	Receive, review, profile in system and consider action to be taken re: P. Feaman's 5/16/17 letter to Judge Scher's judicial assistant re: her 5/16/17 email to counsel of record giving three dates in September and October 2017 to hear Stansbury's Motion of Creditor for Discharge from Further Responsibility re: Illinois action, stating that motion is already set for hearing on 6/2/17	0.20 A PP D
05/17/17	ANG	Strategy conference with JAF re: [REDACTED] [REDACTED]	0.20
05/17/17	JAF	Instructions to CA re [REDACTED] [REDACTED]	0.30
05/17/17	JAF	Strategy conference with ANC re [REDACTED] [REDACTED]	0.20 D
05/17/17	JAF	Preparation for hearing on approval of settlement with T&S, review of pertinent materials, consideration of additional materials needed, [REDACTED] [REDACTED]	0.60
05/17/17	JAF	Correspondence with Alan Rose re hearing on approval of July 2016 settlement.	0.10

05/17/17	JAF	Prepared memorandum on [REDACTED] [REDACTED]	0.20
05/17/17	JAF	Conference with Alan Rose re hearing on approval of settlement agreement on 5-18.	0.30
05/18/17	BMO	Receipt and review of JAF 5/18/17 4:17 pm email memo re: [REDACTED] [REDACTED]	0.10 PR
05/18/17	BMO	Receipt and review of 5/18/17 5:54 pm email from Ted Bernstein to Eliot re: wasteful filings.	0.10
05/18/17	BMO	Prepare for and attend Hearing on various Motions.	1.60
05/18/17	BMO	Receipt and review of 5/18/17 correspondence from Harriet Merlin, JA to Judge Scher, to Eliot Bernstein re: Code of Judicial Conduct, ex parte communication.	0.10
05/18/17	BMO	Receipt and review of 5/18/17 correspondence from Alan Rose to Judge Scher re: Motion for Entry of Standing Order Governing Hearings filed by Trustee, Ted S. Bernstein.	0.10
05/18/17	BMO	Receipt and review of Motion-Opposition to UMC Hearings on 1. Ted Bernstein's M/Approve Compromise and Settlement; Appoint a Trustee and; Determine Compensation for Guardian ad Litem, filed 5/18/17 by Eliot Bernstein.	0.20
05/18/17	BMO	Receipt and review of Notice of Cancellation of Hearing on 6/15/17, filed 5/18/17 by Peter Feaman, on M/Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust, which is Sole Beneficiary of this Estate.	0.10
05/18/17	BMO	Receipt and review of Notice of Withdrawal Without Prejudice of Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust Which is Sole Beneficiary of the Estate Docket, filed 5/18/17 by Alan Rose.	0.10

05/18/17	BMO	Receipt and review of 5/18/17 Order Setting 6/28/17 Hearing from 9:30 a.m. to 12:00 and Establishing Procedure.	0.10	
05/18/17	BMO	Receipt and review of 5/18/17 Order Setting Hearing on 6/2/17 on Stansbury's Motion for Discharge from Further Responsibility for Funding of the Estate Participation in the Chicago Life Insurance Litigation, and for Assumption of Responsibility by the Estate and for Reimbursement.	0.10	
05/18/17	CAA	Telephone conference with Judge Scher's judicial assistant re: P. Feaman's proposed Order Setting Hearing on 6/2/17 versus the three dates proposed by Judge Scher for two dates in September and one in October 2016;	0.20	A PP D
05/18/17	CAA	Prepare and send email to B. O'Connell and J. Foglietta re: [REDACTED] [REDACTED]; prepare and send email to Matrix Mediation re: case style and parties' information for notice of mediation; meet and discuss with J. Foglietta re: [REDACTED] [REDACTED]; telephone conference with D. Vasquez with J. Stamos' office re: same	0.50	A PP D
05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 5/18/17 at 6:04 am email to Judge Scher re: "improperly scheduled UMC hearing brought by Attorney Alan Rose for Ted Bernstein; judicial obligations to report fraud, and misconduct of attorneys, etc." re: 5/18/17 hearing	0.10	A PP D

05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 5/18/17 Motions Objection - Opposition to UMC Hearing on Ted S. Bernstein's Amended Renewed Petition to Re-Close Estate and for Discharge of Successor Personal Representative filed in Estate of Shirley and Estate of Simon; receive, review and profile in system, E. Bernstein's Motion Objection - Oppo to UMC Hearing on Ted Bernstein's Motion to Approve Compromise and Settlement, etc. filed in Trust of Shirley Bernstein actions	0.30	A PP D
05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: invoice from White Lion Moving & Storage for month of June; arrange for payment of same	0.20	A PP D
05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: court's 5/18/17 Order Setting June 28, 2017 Hearing from 9:30 A.M. to 12:00 P.M. and Establishing Procedure re: Trustee's Motion to (1) Approve Compromise and Settlement, (ii) Appoint Trustee for Trusts, etc., and (iii) Determine Compensation for Guardian Ad Litem	0.20	A PP D
05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: court's 5/18/17 Order Setting Hearing on 6/2/17 on Stansbury's Motion for Discharge from Further Responsibility, etc. re: Illinois federal action	0.30	A PP D
05/18/17	CAA	Receive, review, profile in system and consider action to be taken re: Stansbury's Notice of Cancellation of 6/15/17 hearing on Stansbury's Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust, etc.	0.20	A PP D
05/18/17	ANG	Prepare for with BMO and attend Hearing on Motion to Approve Compromise Settlement, Appoint Trustee for Trusts, Determine Compensation of Guardian ad Litem, and for Status Conference to Schedule Additional Hearings.	1.00	

05/19/17	BMO	Receipt and review of 5/19/17 4th DCA Order (4D16-0222) granting Appellant's 5/12/17 Motion for Extension of Time to file a Motion for Rehearing, Clarification, written opinion and certification.	0.10
05/22/17	BMO	Receipt and review of CAA 5/22/17 9:39 am email memo re: [REDACTED] [REDACTED]	0.10 PK
05/22/17	BMO	Receipt and review of 5/22/17 Order (i) Approving Settlement; (ii) Dismissing Remaining Claims; and (iii) Retaining Jurisdiction to Enforce Settlement, Appoint a Trustee for Certain Trusts and Determine Compensation for Guardian ad Litem (502014CP003698XXXXNBIH).	0.10
05/22/17	BMO	Receipt and review of Appellee's Response to Appellant's Motion to Accept Late Filing (Less Than One Day Late), filed 5/22/17 in 4th DCA (4D16-3314) by Alan Rose for Ted Bernstein.	0.10
05/22/17	BMO	Receipt and review of 5/22/17 Order (i) Approving Settlement; (ii) Dismissing Remaining Claims; and (iii) Retaining Jurisdiction to Enforce Settlement, Appoint a Trustee for Certain Trusts and Determine Compensation for Guardian ad Litem.	0.10
05/22/17	BMO	Receipt and review of [REDACTED] [REDACTED]	0.10
05/22/17	CAA	Receive and review email from Adam Simon re: his draft email to mediator Ron Alvarez; prepare and send email to B. O'Connell, A. Crispin and J. Foglietta re: same; receive voicemail from Denise with Jim Stamos' office re: mediation; prepare and send email to B. O'Connell and J. Foglietta re: same; prepare and send email to A. Simon re: agree to his draft email to Ron Alvarez	0.30 A PP D
05/22/17	CAA	Receive and review email from Susan Johnson with P. Feaman's office re: court reporter who reported 4/27/17 hearing; review file re: same; prepare and send response email to S. Johnson giving Pleasanton & Marsaa's job number re: same	0.10 A PP D

05/22/17	CAA	Finalize and mail payment to White Lion re: June 2017 storage fees re: TPP	0.30 A PP
05/23/17	BMO	Receipt and review of 5/23/17 Order Governing Hearings (502014CP003698).	0.10
05/23/17	BMO	Receipt and review of 5/23/17 Order Governing Hearings (502012CP4391).	0.10 D
05/23/17	CAA	Receive and review email from E. Bernstein to P. Feaman re: W. Stansbury's Notice of Hearing for 6/15/17 on Stansbury's Motion for Summary Judgment Denying Ted Bernstein's Motion to Ratify and Confirm Appointment of Ted Bernstein as Trustee, etc.	0.10 A PP D
05/23/17	CAA	Receive, review profile in system and consider action to be taken re: E. Bernstein's Motion Objection-Opposition to UMC Hearing on Ted Bernstein's Motion to Approve Compromise and Settlement; Appoint a Trustee; and Determine Compensation for Guardian Ad Litem	0.10 A PP D
05/23/17	CAA	Receive, review profile in system and consider action to be taken re: Ted Bernstein's 5/18/17 Notice of Withdrawal Without Prejudice of Motion to Ratify and Confirm Appointment of Ted Bernstein as Successor Trustee of Trust, etc.	0.10 A PP D
05/23/17	CAA	Receive, review profile in system and consider action to be taken re: A. Rose's 5/18/17 letter to Judge Scher re: rule on Motion for Entry of Standing Order Governing Hearings (DE 612) or request Court to set for hearing on either 6/2/17 or 6/28/17	0.10 A PP D
05/23/17	CAA	Receive, review profile in system and consider action to be taken re: 4th DCA's 5/19/17 Order granting E. Bernstein's 5/12/17 Motion for Extension to file Motion for Rehearing, Clarification, Written Opinion and Certification - due in 7 days re: 4D16-0222; calendar deadline	0.10 A PP D

05/23/17	CAA	Receive, review, profile in system and consider action to be taken re: Judge Scher's judicial assistant, Harriet Merlin's 5/18/17 letter to E. Bernstein re: returning his 5/18/17 letters "unread" and advising no ex parte communication	0.10 A PP D
05/23/17	CAA	Receive, review, profile in system and consider action to be taken re: Court's 5/22/17 Order (i) Approving Settlement; (ii) Dismissing Remaining Claims; and (iii) Retaining Jurisdiction to Enforce Settlement, Appoint a Trustee for Certain Trusts and Determine Compensation for Guardian Ad Litem re: Ted Bernstein v. Alexandra Bernstein, et al (502014CP003698) action	0.10 A PP D
05/23/17	CAA	Receive, review, profile in system and consider action to be taken re: Appellee, Ted Bernstein's 5/22/17 Response to Appellant's Motion to Accept Late Filing (Less Than One Day Late) re: 4D16-3314	0.10 A PP D
05/23/17	JAF	Instructions to CA re [REDACTED] [REDACTED]	0.20
05/24/17	CAA	Prepare and send email to Matrix Mediation re: case style and names of parties/counsel attending mediation in preparation of Notice of Mediation for 6/1/17; prepare and send email to Denise at Jim Stamos' office re: Illinois case style needed for Notice of Mediation; prepare and send email to A. Rose re: is Ted Bernstein's participation in mediation; modify case style;	1.70 A PP D
05/24/17	CAA	Receive, review, profile in system and consider action to be taken re: Court's 5/23/17 Order Governing Hearings filed in Ted Bernstein v. Alexandra Bernstein, et al (2014CP003698)	0.10 A PP D
05/24/17	CAA	Receive, review, profile in system and consider action to be taken re: Court's 5/23/17 Order Governing Hearings filed in Estate of Simon action	0.10 A PP D

05/24/17	CAA	Receive, review, profile in system and consider action to be taken re: [REDACTED]	0.20
05/25/17	BMO	Receipt and review of CAA 5/25/17 12:33 am email to Dalida re: Notice of Telephonic Mediation for 6/1/17 at 10:00 am.	0.10
05/26/17	BMO	Receipt and review of 5/26/17 7:28 am email from Alan Rose to Peter Feaman re: setting 57.10 sanctions Motion for hearing.	0.10
05/26/17	BMO	Receipt and review of 5/26/17 5:48 am Notice of Service of Court Documents with attached Notice of Appeal in 502012CP004391 and Application for Determination of Civil Indigence re: same.	0.10
05/26/17	BMO	Receipt and review of 5/26/17 5:52 am email from Eliot Bernstein with attached Notice of Appeal and Application for Determination of Civil Indigence in 502012CP004391.	0.10
05/26/17	BMO	Receipt and review of Notice of Service of Court Documents with Notice of Filing Chicago Litigation Order Granting Interested Party Benjamin P. Brown, Curator and Administrator ad Litem for the Estate of Simon Bernstein's Motion to Intervene.	0.10
05/26/17	BMO	Receipt and review of 5/26/17 1:06 pm Notice of Service of Court Documents filed by Peter Feaman - Request for Judicial Notice x2.	0.10
05/26/17	BMO	Receipt and review of 5/26/17 10:23 pm email from Alan Rose re: offer of Ted Bernstein to purchase all of the TPI, in bulk.	0.10
05/26/17	BMO	Receipt and review of Trustee's Response in Opposition to sTansbury's Motion for Discharge from Further Responsibility for the Funding of the Estate's Participation in the Chicago Life Insurance Litigation, filed 5/26/17 by Alan Rose.	0.20
05/26/17	BMO	Receipt and review of Notice of Appeal (502012CP004391) filed 5/26/17 by Eliot Bernstein re 4/27/17 Order Denying Motion to Vacate, etc.	0.10

A PP D

PR

05/27/17	BMO	Receipt and review of 5/27/17 12:43 am email from Tammy Clark with attached 5/26/17 correspondence from Alan Rose to Judge Scher re: 6/1/17 Status Conference.	0.10 PR
05/30/17	BMO	Receipt and review of Notice of Appeal (502012CP004391) filed 5/27/17 by Eliot Bernstein of 4/28/17 Order Denying Eliot Bernstein, as a Beneficiary of the Est. of Simon Bernstein with Standing and an Interested Person Under Law.	0.10
05/30/17	BMO	Receipt and review of Appellee's, Ted Bernstein, as Successor Trustee, Response to Appellant's Motion for Rehearing, filed 5/30/17 with 4th DCA (4D16-222) by Alan Rose.	0.10
05/30/17	BMO	Receipt and review of 5/25/17 correspondence from J. P. Morgan re: brokerage retirement account(s) information.	0.10
05/30/17	BMO	Receipt and review of 5/30/17 9:28 pm email from Matrix Mediation with Amended Invoice for mediation services of Ronald Alvarez on 6/1/17.	0.10 PR
05/31/17	BMO	Receipt and review of JAF 5/31/17 10:03 am email memo re: [REDACTED]	0.10
05/31/17	BMO	Receipt and review of CAA 5/31/17 10:25 am email to James Stamos re: 6/1/17 mediation.	0.10 PR
05/31/17	BMO	Receipt and review of CAA 5/31/17 10:48 am email to Alan Rose re: 6/1/17 Status Conference.	0.10 PR
05/31/17	BMO	Receipt and review of 5/31/17 10:31 am email from Alan Rose re: 6/1/17 Status Conference.	0.10
05/31/17	BMO	Prepare 5/31/17 11:54 am instructional email to CAA re: [REDACTED]	0.10
05/31/17	BMO	Receipt and review of CAA 5/31/17 10:48 am email memo re: [REDACTED]	0.10 PR
05/31/17	BMO	Receipt and review of JAF 5/31/17 10:55 am email memo re: [REDACTED]	0.10 PR

05/31/17	BMO	Receipt and review of Notice of Appeal filed 5/31/17 by Eliot Bernstein with 4th DCA re: 4/27/17 Order Denying Motion to Vacate and Denying Motion to Disqualify for Inappropriate Jurisdiction, Alternatively, Denying on its Merits, and Order Denying Appointment of Ted Bernstein as Administrator ad Litem (Exhibit 1).	0.10
05/31/17	BMO	Receipt and review of Notice of Appeal filed 5/31/17 by Eliot Bernstein with 4th DCA re: 4/28/17 Order Denying Eliot Bernstein, as a Beneficiary of the Estate of Simon Bernstein with Standing and an Interested Person Under Law.	0.10
05/31/17	BMO	Receipt and review of CAA 5/31/17 8:58 am email to Adam Simon re: mediation invoice.	0.10 PR
05/31/17	BMO	Receipt and review of 5/31/17 10:00 am email from Adam Simon re: mediation.	0.10
05/31/17	BMO	Receipt and review of 5/31/17 10:42 am email from Adam Simon re: mediation.	0.10
05/31/17	BMO	Receipt and review of 5/31/17 email from Matrix Mediation with 6/1/17 invoice from same.	0.10 PR
05/31/17	BMO	Receipt and review of 5/31/17 7:00 pm email from Alan Rose to Mr. and Mrs. Eliot Bernstein re: Court Order that parties have 30 days to agree on a Trustee to serve on three trusts for the benefit of their children.	0.10
05/31/17	BMO	Receipt and review of CAA 5/31/17 5:16 pm email to James Stamos re: 6/1/17 mediation.	0.10
05/31/17	CAA	Receive and review Amended Notice of Mediation for 6/1/17 in Illinois federal action on 6/1/17; receive and review invoice from Matrix re: same (1/3 due); arrange for payment; receive and review email from A. Simon re: same; prepare and send response email; prepare mediation folder; prepare and send email to J. Stamos requesting updated fees and costs due him; telephone conference with J. Stamos re: his attendance; email to J. Stamos re: same	3.90 A PP D

05/31/17	CAA	Prepare and send email to A. Rose re: 6/1/17 Status Conference re: Stransbury v. E/O Simon, et al;	0.20 A PP
05/31/17	JAF	Consideration of and prepared instruction memorandum re [REDACTED]	1.60
06/01/17	BMO	Receipt and review of JAF 6/1/17 12:43 pm email memo re: [REDACTED]	0.10
06/01/17	BMO	Receipt and review of CAA 6/1/17 3:22 pm email memo re: [REDACTED]	0.10
06/01/17	BMO	Receipt and review of CAA 6/1/17 4:29 pm email to counsel re: hearing to be set on Successor PR's Petition for Instructions Regarding Conflict of Interest Waivers and Petition for Instructions Regarding Second Mortgage and Note.	0.10 PR
06/01/17	BMO	Receipt and review of 6/1/17 4:31 pm email from Peter Feaman re: hearing on Petition for Instructions Regarding Conflict of Interest Waivers and Petition for Instructions Regarding Second Mortgage and Note.	0.10
06/01/17	BMO	Receipt and review of 6/1/17 4:35 pm email from Alan Rose re: hearing on Petition for Instructions Regarding Conflict of Interest Waivers and Petition for Instructions Regarding Second Mortgage and Note.	0.10
06/01/17	BMO	Receipt and review of CAA 6/1/17 5:22 pm email with attached second invoice from Matrix.	0.10 PR
06/01/17	BMO	Prepare for and attend telephone mediation (including strategy call with Jim Stamos).	3.40
06/01/17	BMO	Receipt and review of Notice of Filing Transcript of Hearing held 5/23/14, filed 6/1/17 3:40 pm by Peter Feaman.	0.10
06/01/17	CAA	Profile A. Rose's 5/10/17 letter to Judge Scher re: 5/18/17 hearing	0.10 A PP

06/01/17	CAA	Prepare hearing folder for 6/2/17 hearing on Stansbury's Motion for Discharge; draft proposed Order; prepare and send email to J. Foglietta re: same	1.90	
06/01/17	CAA	Telephone conference with (received from) Niki with Matrix Mediation re: overage of time in telephone Mediation; receive and review email from Niki with Matrix re: invoice for overage amount; prepare and send email to B. O'Connell re: same; arrange for payment	0.40	A PP
06/01/17	CAA	Receive email instructions from J. Foglietta re: [REDACTED]; [REDACTED]; review court's docket sheet; review Judge Scher's suspension calendar; review calendar; prepare and send email to counsel coordinating same	0.70	A PP D
06/01/17	CAA	Receive, review, profile in system and consider action to be taken re: Stansbury's Notice of Filing 5/23/14 Hearing Transcript, and Notice of Filing Chicago Litigation Order Granting Interested Party Benjamin Brown, Curator and Administrator Ad Litem for Estate of Simon Bernstein's Motion to Intervene; update hearing folder with same on Stansbury's Motion for Discharge, etc. set for 6/2/17	0.30	A PP D
06/01/17	CAA	Receive, review, profile in system and consider action to be taken re: Stansbury's 5/26/17 Request for Judicial Notice re: Successor PR's Pet for Auth to Enter Into Contingency Agreement with Illinois Counsel, etc., and Stansbury's Request for Judicial Notice re: Successor PR's Amended Pet for Auth to Enter Into Contingency Agreement, etc.; update 6/2/17 hearing folder re: same	0.30	A PP D
06/01/17	CAA	Receive, review, profile in system and consider action to be taken re: Ted Bernstein's Response to Stansbury's Motion for Discharge from Further Responsibility re: funding Illinois action; update 6/2/17 hearing folder re: same	0.40	A PP D

06/01/17	ANG	Attend, in part, telephonic mediation in Illinois Federal action.	1.80
06/01/17	JAF	Prepared instruction memorandum to CA re [REDACTED]	0.40
06/01/17	JAF	Prepared memo re [REDACTED]	0.20
06/02/17	BMO	Receipt and review of CAA 6/2/17 2:44 pm email to counsel re: UMC hearing on Successor PR's Petitions to be filed.	0.10 PR
06/02/17	BMO	Receipt and review of 6/2/17 2:49 pm email from John Morrissey re: UMC hearing on Successor PR's Petitions to be filed.	0.10 PR
06/02/17	BMO	Prepare for and attend Hearing re: Stansbury discharge.	1.50
06/02/17	BMO	Receipt and review of 6/2/17 2:50 pm email from John Morrissey re: UMC hearing on Petition for Instructions Re: Conflict of Interest Waivers and Petition for Instruction Re: Second Mortgage and Note.	0.10
06/02/17	BMO	Prepare 6/2/17 10:09 am email to Alan Rose re: pre-hearing discussion.	0.10
06/02/17	BMO	Receipt and review of 6/2/17 8:55 am email from Alan Rose re: 6/2/17 hearing.	0.10
06/02/17	BMO	Receipt and review of 6/2/17 4th DCA Order granting appellant's 5/5/17 Motion to Accept Timely Brief (4D16-3314).	0.10
06/02/17	BMO	Receipt and review of 4th DCA 6/2/17 Acknowledgment of New Case (4DCA 17-1608), Eliot v. Estate of Simon Bernstein.	0.10
06/02/17	BMO	Receipt and review of 6/2/17 4th DCA Order re: payment of filing fee (4D17-1608) Eliot v. Estate of Simon Bernstein.	0.10
06/02/17	BMO	Receipt and review of 6/2/17 4th DCA Acknowledgment of New Case (4DCA 17-1607) Eliot v. Estate of Simon Bernstein.	0.10
06/02/17	BMO	Receipt and review of 6/2/17 4th DCA Order re: filing fee (4D17-1607) Eliot Bernstein v. Estate of Simon Bernstein.	0.10

06/02/17	CAA	Receive and review multiple emails from A. Rose, P. Feaman and D. Lewis re: their availability on 6/15/17 for UMC hearing on our to be filed Petition for Instructions re Conflict of Interest Waivers and Petition for Instructions re Second Mortgage and Note; discuss same with J. Foglietta; prepare and send email to counsel re response needed from E. Bernstein and J. Morrissey	0.30 A PP D
06/03/17	BMO	Receipt and review of 6/3/17 1:14 pm email from Esquire re: 5/18/17 hearing transcript.	0.10 PR
06/05/17	BMO	Receipt and review of 6/5/17 Order Continuing 6/2/17 Hearing to be Heard First at Hearing Set for 6/28/17.	0.10
06/05/17	BMO	Receipt and review of Notice of Continued Hearing (Special Set), filed 6/5/17 11:13 am by Peter Feamon on Stansbury Motion for Discharge from Further Responsibility for the Funding of the Estate's Participation in the Chicago Life Insurance Litigation and for Assumption of Responsibility by the Estate and for Reimbursement of Advanced Funds.	0.10
06/05/17	BMO	Receipt and review of Application for Determination of Civil Indigent Status filed 6/5/17 10:58 am by Eliot Bernstein (502012CP004391).	0.10
06/05/17	BMO	Receipt and review of 6/5/17 4th DCA Order granting Appellant's 5/30/17 Motion to Accept Motion for Rehearing and Other Relief (4D16-0222).	0.10
06/05/17	BMO	Receipt and review of IRS 5/31/17 correspondence re: Form 8821, Tax Information Authorization.	0.10
06/05/17	CAA	Draft Notice of Hearing for status conference on our "to be filed" Petition for Instructions Regarding Conflict of Interest Waivers, and Petition for Instructions Regarding Second Mortgage and Note; telephone conference with A. Rose re: 6/13/17 date; prepare and send email to B. O'Connell and J. Foglietta re: same; e-file Notice of Hearing	1.20 U UTA . 3 PP

06/05/17	JAF	Reviewed NOH for status conference on to be filed petitions re conflict waiver and instructions on home Eliot is residing in.	0.10	
06/06/17	BMO	Attend telephone call with Alan Rose re: Illinois litigation.	1.00	
06/06/17	BMO	Conference with JAF re: [REDACTED] [REDACTED]	0.20	
06/06/17	BMO	Receipt and review of Application for Determination of Civil Indigent Status filed 6/6/17 by Eliot (502012CP004391).	0.10	D
06/06/17	BMO	Receipt and review of 6/6/17 correspondence from Peter Feaman to Hon. Cymonie Rowe with proposed Order on Status Conference which was held on 6/1/17.	0.10	
06/06/17	BMO	Receipt and review of Motion for Extension of Time; Rehearing of 5/22/17 Order "Order Approving Settlement; Dismissing Remaining Claims; and Retaining Jurisdiction to Enforce Settlement, Appoint a Trustee for Certain Trusts and Determine Compensation for Guardian ad Litem," filed 6/6/17 by Eliot Bernstein.	0.10	
06/06/17	CAA	Receive, review profile in system and consider action to be taken re: Eliot's 5/26/17 Notice of Appeal re: 4/27/17 Order Denying Motion to Vacate and Denying Motion to Disqualify for Inappropriate Jurisdiction, Alternatively, Denying on Its Merits, and Order Denying Appointment of Ted Bernstein as Administrator Ad Litem; and 2/7/17 Application for Determination of Civil Indigence filed on 5/26/17	0.10	A P P D
06/06/17	CAA	Receive, review profile in system and consider action to be taken re: Eliot's 5/27/17 Motion for Rehearing, Clarification, Written Decision and Certification Under Florida Rules of Appellate Procedure 9.330, and Eliot's 5/27/17 Motion to Accept Motion for Rehearing and Other Relief Filed Less Than One Hour Late re: 4D16-0222	0.10	A P P D

06/06/17	CAA	Receive, review profile in system and consider action to be taken re: E. Bernstein's 5/27/17 Notice of Appeal re: Judge Colton's 4/28/17 Order Denying Eliot Bernstein, as a Beneficiary of the Estate of Simon Bernstein with Standing and an Interested Person Under Law, and Application for Determination of Indigency	0.20	A PP D
06/06/17	CAA	Receive, review profile in system and consider action to be taken re: Ted Bernstein's 5/30/17 Response to Appellant's Motion for Rehearing re: 4D16-0222	0.10	A PP D
06/06/17	CAA	Receive, review profile in system and consider action to be taken re: 5/25/17 letter from JP Morgan re: retirement account will become self-directed investing account after close of business on 6/9/17 and new lower commission rates will apply	0.10	A PP D
06/06/17	JAF	Conference with BMO re [REDACTED]	0.20	
06/07/17	BMO	Receipt and review of 6/5/17 Order on Status Conference of 6/1/17.	0.10	
06/07/17	CAA	Draft Amended Notice of Hearing for 6/13/17 to add additional "to be filed" petitions to be heard; <u>e-file with Court</u>	0.60 .2	UT U A PP
06/07/17	JAF	Prepared memorandum to BMO re [REDACTED]	0.30	
06/07/17	JAF	Prepared memorandum to BMO re [REDACTED]	0.10	
06/07/17	JAF	Prepared instruction memo to CCC re [REDACTED]	0.20	
06/07/17	JAF	Prepared instruction memo to CCC re [REDACTED]	0.20	D
06/08/17	BMO	Receipt and review of 6/8/17 11:37 pm email from Alan Rose re: Stansbury v. Estate of Simon - Mracheck fee payment protocol.	0.10	

06/08/17	BMO	Receipt and review of 6/8/17 2:01 pm email from Trish Roth (Feaman firm) re: scheduling a special set hearing in Stansbury - Estate of Simon Bernstein (estate case).	0.10 PR
06/08/17	BMO	Receipt and review of JAF 6/8/17 5:21 pm email to Alan Rose re: purported intellectual property interests of Simon.	0.10
06/08/17	BMO	Receipt and review of 6/8/17 5:27 pm email from Alan Rose re: purported intellectual property interests of Simon.	0.10
06/08/17	BMO	Receipt and review of JAF 6/8/17 5:31 pm follow-up email to Alan Rose.	0.10
06/08/17	BMO	Receipt and review of 6/8/17 5:40 pm email from Alan Rose with attached caselaw, Memorandum Opinion.	0.10
06/08/17	BMO	Receipt and review of 6/8/17 7:36 pm email from Ted Bernstein re: ownership issues.	0.10
06/08/17	BMO	Receipt and review of 6/8/17 4:54 pm email from Alan Rose re: Stansbury request for special set hearing.	0.10
06/08/17	BMO	Receipt and review of 6/8/17 Order Setting Jury Trial and Directing Pretrial and Mediation Procedures.	0.10
06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's Notice of Appeal re: 4/27/17 Order Denying Motion to Vacate and Denying Motion to Disqualify for Inappropriate Jurisdiction, etc. filed in 4D17-1607	0.30 A PP D
06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 5/31/17 Notice of Appeal filed in 4D17-1608 re: 4/28/17 Order Denying E. Bernstein, as Beneficiary of the Estate of Simon Bernstein With Standing and an Interested Person Under Law	0.10 A PP D
06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: 4th DCA's 6/2/17 Acknowledgment Letter re: E. Bernstein's appeal - 4D17-1607	0.20 A PP D

06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: 4th DCA's 6/2/17 Order re: Appellant to pay filing fee and ordering him to file copy of Order determining him indigent re: 4D17-1607	0.20	A PP D
06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: 4th DCA's 6/2/17 Acknowledgment Letter, and 6/2/17 Order directing E. Bernstein to pay filing fee and file lower Court's Order determining him indigent re: Appeal 4D17-1608	0.20	A PP D
06/08/17	CAA	Receive, review, profile in system and consider action to be taken re: Stansbury's Notice of Continued Hearing to 6/28/17 on his Motion of Creditor for Discharge from Further Responsibility re: Illinois action	0.10	A PP D
06/08/17	JAF	Review of information in file on IP interests.	0.30	
06/08/17	JAF	Instruction memo to CCC re [REDACTED] [REDACTED] [REDACTED] [REDACTED]	0.30	
06/08/17	CCC	Drafted Petition for Authorization for the Successor Personal Representative to assign and/or transfer any interest of Simon Bernstein and/or the Estate of Simon Bernstein in any intellectual property purportedly owned by Simon Bernstein and/or the Estate of Simon Bernstein to Eliot Bernstein	0.60	
06/08/17	CCC	Drafted Petition for Authorization to Sell TPP in Bulk to Ted Bernstein	0.70	
06/08/17	CCC	Reviewed additional information regarding Ted Bernstein's offer to purchase the TPP for incorporation into the Petition Requesting Authorization to Sell TPP to him	0.10	
06/09/17	BMO	Receipt and review of Appellee's, Ted S. Bernstein, Trustee, Motion to Dismiss Appeal, filed 6/9/17 by Alan Rose.	0.10	
06/09/17	CAA	Receive and review letter from IRS re: Form 8821; attempts to communicate with IRS re: same and request that we need the actual 1040s and 1041s;	0.40	

06/09/17	CAA	Receive and review multiple emails from e-Filing Portal re: advising E. Bernstein that his multiple filed Applications for Determination of Civil Indigent Status in multiple matters are unsigned and have to be re-filed	0.10 A P P D
06/09/17	CAA	Receive, review, profile in system and consider action to be taken re: 6/5/17 Order Continuing 6/2/17 Hearing to be Heard First at Hearing Set for June 28, 2017 (re: Stansbury's Motion for Discharge from Further Responsibility re: Illinois action, is to be heard first); update Calendar re: same	0.20 A P P D
06/09/17	CAA	Receive, review, profile in system and consider action to be taken re: 4th DCA's 6/5/17 Order Granting E. Bernstein's 5/30/17 Motion to Accept Motion for Rehearing and Other Relief Filed Less Than One Hour Late, but Denying his 5/30/17 Motion for Rehearing re: 4D16-0222	0.10 A P P D
06/09/17	CAA	Receive, review, profile in system and consider action to be taken re: 4th DCA's 6/2/17 Order Granting E. Bernstein's Motion to Accept Timely Brief re: 4D16-3314 (E. Bernstein v. Ted Bernstein, etc.); review file re: same;	0.20 A P P D
06/09/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 6/6/17 SIGNED Application for Determination of Civil Indigent Status filed in estate action, 1162 action, 3698 action,	0.10 A P P D
06/09/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 6/5/17 Applications for Determination of Civil Indigent Status filed in 2012CP004391, 2015CP1162, 2011CP653, 2014CP3698, and 2012CA13933	0.40 A P P D
06/09/17	CCC	Analyzed information regarding [REDACTED] for incorporation into the Petition for Authorization to Transfer any Interest in IP Rights	0.70
06/09/17	CCC	Revised Petition for Authorization to Transfer any Interest in IP Rights	0.20

06/09/17	CCC	Revised Petition for Authorization to Sell TPP in bulk to Ted Bernstein	0.40	UT
06/09/17	CCC	Reviewed Memo on [REDACTED] [REDACTED] for incorporation into Petition for Authorization to Sell TPP in bulk to Ted Bernstein	0.20	
06/10/17	BMO	Receipt and review of 6/10/17 9:44 am email from Alan Rose re: CBIZ.	0.10	
06/10/17	BMO	Receipt and review of 6/10/17 9:52 am email from Alan Rose re: Stansbury v. Est. of Simon - Mrachek fee payment protocol.	0.10	
06/10/17	BMO	Receipt and review of 6/10/17 7:58 pm email from Alan Rose to Peter Feaman re: dates to depose Stansbury.	0.10	PR
06/12/17	BMO	Prepare 6/12/17 7:16 am email to Alan Rose re: CBIZ.	0.10	
06/12/17	BMO	Receipt and review of email from Alan Rose with draft Answer Brief re: Eliot's appeal of the order approving the PR and the Trustee's "even up" for the furniture sold at the Aragon condo.	0.30	
06/12/17	CAA	Prepare hearing folder on Status Conference on various "To Be Filed" Petitions; draft proposed Order on same; arrange for Court Reporter	1.80 .4	UT U A PP
06/12/17	CAA	Receive, review, profile in system and consider action to be taken re: E. Bernstein's 6/6/17 Motion for Extension of Time: Rehearing of 5/22/17 Order "Order (i) Approving Settlement; (ii) Dismissing Remaining Claims; and (iii) Retaining Jurisdiction to Enforce Settlement, Appoint a Trustee for Certain Trusts and Determine Compensation for Guardian Ad Litem re: Ted Bernstein v. Alexandra Bernstein, et al, Case No. 2014CP3698	0.10	A PP D
06/12/17	CAA	Receive, review, profile in system and consider action to be taken re: 6/5/17 Order on Status Conference of 6/1/17 re: Stansbury v. Estate of Simon, Case No. 202CA13933 (Judge Rowe)	0.10	A PP D