

# Bernstein Family

- Simon – DOB 12/02/1935 DOD 09/13/2012
- Shirley – DOB 06/29/1939 DOD 12/08/2010
  - Ted 08/27/1959
    - Alexandra
    - Eric
    - Michael
      - Matt Logan Stepson
  - Pamela 10/25/1960
    - Molly 12/03
  - Eliot 09/30/1963
    - Joshua 08/27/1997
    - Jacob 01/01/1999
    - Daniel 11/26/2002
  - Jill 10/25/1965
    - Julia 01/07/2009
  - Lisa 03/15/1967
    - Max 01/30/
    - Carley 02/17

# Timeline

- 2006(?) Ted Bernstein Client, Business Associates and Friends – Tescher & Spallina PA (Tescher leaves his longtime Miami firm to partner with Spallina who leaves Sony Digital)
- 2008 Ted Bernstein convinces father to use TS to get new ins business from them
- 2008 Simon and Shirley redo prior 2000 Proskauer plans which replaced prior Hopkins/Sutter (acquired by Foley & Lardner) plans. Homes and furnishing put into Shirley Trust.
  - 2008 Eliot Bernstein Family Trust, Jill Iantoni Family Trust & Lisa Friedstein Family Trust created, filed and funded as beneficiaries of Simon and Shirley Trusts
  - BFR created for Eliot Bernstein Family
- 2010 Shirley dies Trust becomes Irrev with Eliot, Jill and Lisa Family Trusts Beneficiaries. Ted, Pam and their lineal descendants disinherited.
- 2010 Pam hires attorney regarding her inheritance and Spallina tips off Ted and Pam that they are disinherited from both Simon and Shirley Trusts without approval from Simon.
- 2010 Ted and Pam are enraged at Simon and go on rampage against him lasting until his death.
- May of 2012 Simon calls family meeting to discuss options to include Ted and Pam's children into estates if possible to end isolation of Simon from his grandchildren (all but Eliot's), excluding Ted and Pam again.
  - May of 2012 Waivers are sent to children for Shirley Estate to Close – All but Jill sign and return prior to Simon's death. TS are to get Eliot, Jill and Lisa accounting of their inheritances to make waivers signable, they never do.
- Allegedly in August of 2012 Simon redoes his Will and amends his 2008 trust.
- Sept of 2012 Simon dies without ever closing Shirley's estate
- January 11, 2013 TS turns over partial documents for Estates and Trusts to atty C. Yates with fraudulently altered Shirley Trust which fraudulently amends her trust to include following language which puts Ted and Pam children back into her Irrev Trust
  - "Notwithstanding the foregoing, as my spouse and I have adequately provided for them during our lifetimes, for purposes of the dispositions made under this Trust, my children, TED S. BERNSTEIN ("TED") and PAMELA B. SIMON ("PAM"), shall be deemed to have predeceased the survivor of my spouse and me, provided, however, if my children, ELIOT BERNSTEIN, JILL IANTONI and LISA S. FRIEDSTEIN, and their respective lineal descendants all predecease the survivor of my spouse and me, then TED and PAM shall not be deemed to have predeceased the survivor of my spouse and me and shall become eligible beneficiaries for purposes of the dispositions made hereunder."
- January 2013 Simon allegedly closes Shirley Estate after he is dead by signing documents, later discovered and proven forged and fraudulently altered. TS notary public arrested and convicted.
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## Simon & Shirley Alleged Estate Plan Flowchart May 20, 2008 Documents

Simon Will

Simon Trust Rev

Simon Trust Irrev  
Wilmington

Shirley Trust Rev  
Missing Irrev

Shirley Will

Amend 1 – Remove Matt

Amend 2 – Fraud Attempt to Insert Ted & Pam Children

### 2008 Beneficiaries

Shirley + 5  
children (Ted,  
Pam, Eliot, Jill &  
Lisa) – Residuary  
Simon Rev Trust

3 children (Eliot, Jill & Lisa). Ted & Pam & Lineals  
Predeceased

Upon death of Simon money paid to Simon L. Bernstein Trust dated **May 13, 2008 no trust with this date ever produced.** On August 31, 2012 account has \$2 829 962 through 49.5% holding in Bernstein Family Investments LLLP. If Shirley holds a Wilmington Trust where is it and how much was in it when she died? She is other 49.5%!

3 children (Eliot, Jill & Lisa). Ted & Pam & Lineals  
Predeceased

Simon +  
5 children (Ted, Pam, Eliot, Jill & Lisa) – Residuary Shirley Rev Trust

### May 20, 2008 Sub Trusts Funded Created for Beneficiaries

Eliot Bernstein Family Trust – Jill Iantoni Family Trust – Lisa Friedstein Family Trust

### 2008 Fiduciaries

Shirley Successor  
Bill Stansbury

Shirley Successor  
Bill Stansbury

Willmington  
Trustee,  
Stansbury  
Protector Trustee

Simon Successor  
Ted Bernstein

Simon Successor  
Ted Bernstein

**UPON SHIRLEY DEATH DECEMBER 08, 2010 TRUST REVOCABLE TRUST BECOMES IRREVOCABLE**

Shirley Trust Rev  
Missing Irrev

Amend 1 – Remove Matt

Shirley Will

Amend 2 – Fraud Attempt to Insert Ted & Pam Children

**2010 Permissible Class of Beneficiaries Irrevocably**

3 children (Eliot, Jill & Lisa). Ted & Pam & Their Lineals Predeceased

Simon + 5 children (Ted, Pam, Eliot, Jill & Lisa) – Residuary Shirley Rev Trust

**May 20, 2008 Sub Trusts Funded Created for Beneficiaries**

Eliot Bernstein Family Trust – Jill Iantoni Family Trust – Lisa Friedstein Family Trust

Simon Successor  
Ted Bernstein

**2008 Fiduciaries**

Simon Successor  
Ted Bernstein

**Optional Trusts Created Upon Death**

Marital Trust – NEVER  
CREATED

Family Trust – NEVER  
CREATED

Simon Bernstein as Trustee has LIMITED Power of Appointment for Permissible Class of Beneficiaries.  
**Applies Only to the Marital & Family Trusts.**

Since neither trust was created or funded Simon's POA becomes moot whether executed or not.

If After Construction Hearing Beneficiaries are determined to be Grandchildren through the POA the only Grandchildren that can be possible beneficiaries from the Permissible Class of Beneficiaries are Eliot, Jill and Lisa's 6 Children as Ted, Pam & their lineal descendants remain predeceased "for all purposes of disposition." Funds would still go into the Family Trusts of Eliot, Jill and Lisa Only.

## Simon Bernstein Alleged Changes July 25, 2012 Simon Deceased September 13, 2012

2012 Simon Will  
Replaces 2008

Simon Trust Rev 2008

Simon Trust Irrev  
Wilmington

Shirley Trust Rev  
Missing Irrev

Shirley Will

2012 Amend 1

Amend 1 – Remove Matt

Amend 2 – Fraud Attempt to Insert Ted & Pam Children

5 children (Ted,  
Pam, Eliot, Jill &  
Lisa) – Residuary  
Simon Rev Trust

Beneficiaries 6  
Grandchildren - defined as  
“then living grandchildren  
who hold trusts held  
hereunder” (trusts refer to  
Eliot, Jill & Lisa Family Trusts)  
with Ted & Pam & Lineals  
still defined as Predeceased  
Simon then adds Eliot, Jill  
and Lisa (**NOT THEIR**  
**CHILDREN**) as Predeceased  
and their children are only  
ones who are then living and  
hold trusts thereunder.

2012 Beneficiaries

3 children (Eliot, Jill  
& Lisa). Ted & Pam  
& Lineals  
Predeceased

Simon + 5  
children (Ted,  
Pam, Eliot, Jill &  
Lisa) – Residuary  
Shirley Rev Trust

May 20, 2008 Sub Trusts Funded Created for Beneficiaries

Eliot Bernstein Family Trust – Jill Iantoni Family Trust – Lisa Friedstein Family Trust – With Eliot, Jill and Lisa Predeceased their Children  
are remaining beneficiaries

2012 Simon Will Executes POA Over Family & Marital Trusts which were never created therefore MOOT

### ARTICLE II. EXERCISE OF POWER OF APPOINTMENT

Under Subparagraph E. I. of Article II. of the SHIRLEY BERNSTEIN TRUST AGREEMENT dated May 20, 2008, (the "Shirley Trust"), I was granted a special power of appointment upon my death to direct the disposition of the remaining assets of the Marital Trust and the Family Trust established under the Shirley Trust. Pursuant to the power granted to me under the Shirley Trust, upon my death, I hereby direct the then serving Trustees of the Marital Trust and the Family Trust to divide the remaining trust assets into equal shares for my then living grandchildren and distribute said shares to the then serving Trustees of their respective trusts established under Subparagraph 11.B. of my Existing Trust, as referenced below, and administered pursuant to Subparagraph 11.C. thereunder.

Robert Spallina &  
Donald Tescher

Robert Spallina & Donald  
Teschner – Successor Cannot be  
Family when TS REMOVED FOR  
FRAUD BUT TED PUT IN

2008 Fiduciaries

Simon Successor  
Ted Bernstein

Simon Successor  
Ted Bernstein

## Alternate Alleged Simon Bernstein Changes July 25, 2012 Simon Deceased September 13, 2012

2012 Simon Will  
Replaces 2008

Simon Trust Rev 2008

Simon Trust Irrev  
Wilmington

Shirley Trust Rev  
Missing Irrev

Shirley Will

2012 Amend 1

Amend 1 – Remove Matt

Amend 2 – Fraud Attempt to Insert Ted & Pam Children

5 children (Ted,  
Pam, Eliot, Jill &  
Lisa) – Residuary  
Simon Rev Trust

Beneficiaries 10  
Grandchildren – Alleged that  
Post Mortem Trusts were  
created for 10 Grandchildren  
but **NO TRUSTS EVER**  
**PRODUCED AS PART OF**  
**VALIDITY HEARING. ELIOT**  
**AND HIS CHILDREN WERE**  
**NEVER SENT ANY COPIES OF**  
**TRUSTS FOR 3 CHILDREN.**  
**NO NOTICE OF TRUSTS.** Had  
to be created prior to death  
according to Simon Amend  
Language.

2012 Beneficiaries

Beneficiaries 10  
Grandchildren- Allege Shirley  
Beneficiaries are created  
under Simon Bernstein Trust  
dated 9/13/12 but NO TRUST  
WITH THIS NAME EVER  
PRODUCED DESPITE PARTIES  
IN SHIRLEY TRUST ACTION  
SUED UNDER THIS NAME. **No**  
**10 trusts ever produced.**  
Simon could not add  
beneficiaries to Shirley Trust.

Simon + 5  
children (Ted,  
Pam, Eliot, Jill &  
Lisa) – Residuary  
Shirley Rev Trust

### May 20, 2008 Sub Trusts Funded Created for Beneficiaries

This theory attempts to dismiss these trusts - Eliot Bernstein Family Trust – Jill Iantoni Family Trust – Lisa Friedstein Family Trust –  
With Eliot, Jill and Lisa Predeceased in Simon Amend their Children are remaining beneficiaries

### 2012 Simon Will Executes POA Over Family & Marital Trusts which were never created therefore MOOT

#### ARTICLE II. EXERCISE OF POWER OF APPOINTMENT

Under Subparagraph E. I. of Article II. of the SHIRLEY BERNSTEIN TRUST AGREEMENT dated May 20, 2008, (the "Shirley Trust"), I was granted a special power of appointment upon my death to direct the disposition of the remaining assets of the Marital Trust and the Family Trust established under the Shirley Trust. Pursuant to the power granted to me under the Shirley Trust, upon my death, I hereby direct the then serving Trustees of the Marital Trust and the Family Trust to divide the remaining trust assets into equal shares for my then living grandchildren and distribute said shares to the then serving Trustees of their respective trusts established under Subparagraph 11.B. of my Existing Trust, as referenced below, and administered pursuant to Subparagraph 11.C. thereunder.

Robert Spallina &  
Donald Tescher

Robert Spallina & Donald  
Tescher – Successor Cannot be  
Family

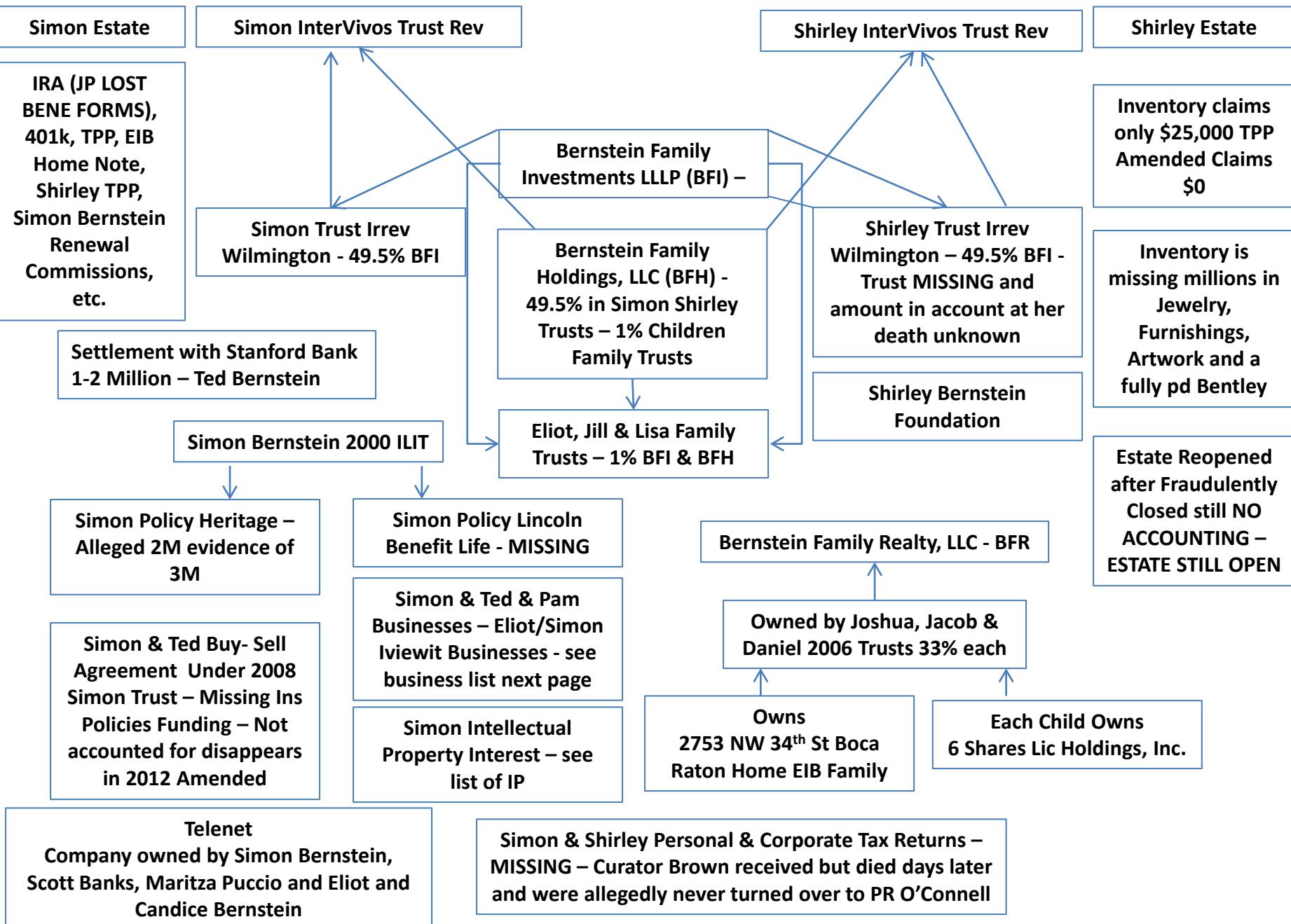
2008 Fiduciaries

Simon Successor  
Ted Bernstein

Simon Successor  
Ted Bernstein

Simon & Shirley Alleged Estate Plan Flowchart May 20, 2008 Documents

## Known Assets



# Simon Bernstein Business Interests

- ALPS (Arbitrage Life Payment System)
- Arbitrage International Holdings, LLC
- Arbitrage International Management LLC
- Arbitrage International Management LLC
- Arbitrage International Marketing, Inc.
- Arbitrage International Marketing, Inc.
- Bernstein & Associates, Inc.
- Bernstein Family Investments, LLLP dated May 20, 2008
- Bernstein Holdings, LLC dated May 20, 2008.
- Bernstein Family Realty LLC
- Bernstein Simon and Shirley – A company in Boca Raton, FL.
- Cambridge Associates Of Indiana, Inc.
- Cambridge Companies
- Cambridge Financing Company
- LIC Holdings, Inc.
- Life Insurance Concepts
- Life Insurance Concepts Inc.
- Life Insurance Concepts, LLC
- Life Insurance Connection Inc.
- Life Insurance Innovations, Inc.
- National Service Association, Inc.
- National Service Association, Inc.
- National Service Corporation
- National Service Corporation (Florida)
- NSA, Inc.
- S.T.P. Enterprises
- SB Lexington. Inc.
- S.B. Lexington Inc. Death Benefit Plan United Bank of Illinois NA. (ein 363479122)
- Shirley Bernstein Family Foundation Inc. and Deborah Bernstein involvement
- Simon and Shirley Bernstein (company or Foundation?)
- Syracuse Partners Incorporated
- Iviewit Holdings, Inc. – DL
- Iviewit Holdings, Inc. – DL (two identically named in Delaware)
- Iviewit Holdings, Inc. – NY (three identically named)
- Iviewit Holdings, Inc. – FL (four identically named)
- Iviewit Technologies, Inc. – DL
- Uviewit Holdings, Inc. – DL
- Uview.com, Inc. – DL
- Iviewit.com, Inc. – FL
- Iviewit.com, Inc. – DL
- I.C., Inc. – FL
- Iviewit.com LLC – DL
- Iviewit LLC – DL
- Iviewit Corporation – FL
- Iviewit, Inc. – FL
- Iviewit, Inc. – DL
- Telenet Systems, Inc.
- Telenet Systems, LLC
- Total Brokerage Solutions LLC
- TSB Holdings, LLC

# Simon Bernstein Intellectual Properties List

## United States Patents

09/630,939 -

**System & Method for Providing an Enhanced Digital Image File SUSPENDED BY COMMISSIONER OF PATENTS February 17, 2004**

09/630,939

**System & Method for Providing an Enhanced Digital Image File SUSPENDED BY COMMISSIONER OF PATENTS February 17, 2004**

09/630,939

**System & Method for Providing an Enhanced Digital Image File SUSPENDED BY COMMISSIONER OF PATENTS February 17, 2004**

09/522,721

**Apparatus & Method for Producing Enhanced Digital Images PENDING SUSPENSION FILED February 26, 2004**

09/587,734

**System & Method for Providing an Enhanced Digital Video File SUSPENDED BY COMMISSIONER OF PATENTS February 26, 2004**

09/587,734

**System & Method for Providing an Enhanced Digital Video File SUSPENDED BY COMMISSIONER OF PATENTS February 26, 2004**

09/587,026

**System & Method for Playing a Digital Video File SUSPENDED BY COMMISSIONER OF PATENTS February 26, 2004**

09/587,730

**System & Method for Streaming an Enhanced Digital Video File SUSPENDED BY COMMISSIONER OF PATENTS February 26, 2004**

60/223,344 - Zoom & Pan Using a Digital Camera

60/233,341 - Zoom & Pan Imaging Design Tool

60,169,559 - Apparatus and Method for Producing Enhanced Video Images and/or Video Files

60/155,404 - Apparatus & Method for Producing Enhanced Video Images and/or Video Files

60/149,737 - Apparatus and Method for Producing Enhanced Digital Images and/or Digital Video Files

60/146,726 - Apparatus & Method for Producing Enhanced Digital Images

60/141,440 - Apparatus & Method for Providing and/or transmitting Video Data and/or Information in a Communication Network

60/137,921 - Apparatus & Method for Playing Video Files Across the Internet

60/137,297 - Apparatus & Method for Producing Enhanced Video Images

60/125,824 - Apparatus & Method for Producing Enhanced Digital Images

## Foreign Patents

[PCT/US00/21211](#)

[System & Method for Providing an Enhanced Digital Image File](#)

[PCT/US00/15602](#)

[System & Method for Video Playback Over a Network](#)

[PCT/US00/15406](#)

[System & Method for Playing a Digital Video File](#)

[15406 Part 1 Attachment](#)

[15406 Part 2 Attachment](#)

[15406 Part 3 Attachment](#)

[PCT US00/15408](#)

[System & Method for Streaming an Enhanced Digital Video File](#)

[PCT/US00/15405](#)

[System & Method for Providing an Enhanced Digital Video File](#)

[PCT US00/07772](#)

[Apparatus & Method for Producing Enhanced Digital Images](#)

[EPO 00938126.0](#)

[System & Method for Streaming an Enhanced Digital Video File](#)

[EPO 00944619.6](#)

[System & Method for Streaming an Enhanced Digital Video File](#)

[EPO 00955352.0](#)

[System & Method for Providing an Enhanced Digital Image File](#)

[Japan 2001 502364](#)

[System & Method for Streaming an Enhanced Digital Video File](#)

[Japan 2001 502362](#)

[System & Method for Streaming an Enhanced Digital Video File](#)

[Japan 2001 514379](#)

[System & Method for Providing an Enhanced Digital Image File](#)

[Korea PCT US00 15408](#)

## Trademarks (Copyrights, Trade Secrets, etc. Missing)

75/725,802 - THE CLICK HEARD 'ROUND THE WORLD June 8, 1999 FILED July 27, 2004

75/725,805 - IVIEWIT "YOUR THIRD EYE TO THE WORLD" June 8, 1999 FILED July 27, 2004

75/725,806 - IVIEWIT "YOUR THIRD EYE TO THE WORLD" June 8, 1999 FILED July 27, 2004

75/725,807 - IVIEWIT "YOUR THIRD EYE TO THE WORLD" (THIS MARK IS MISSING PROPER QUOTES June 8, 1999 FILED July 27, 2004

75/725,808 - IVIEWIT "YOUR THIRD EYE TO THE WORLD June 8, 1999 FILED July 27, 2004

75/725,809 - IVIEWIT "YOUR THIRD EYE TO THE WORLD June 8, 1999 FILED July 27, 2004

75/725,810 - IVIEWIT "YOUR THIRD EYE TO THE WORLD June 8, 1999 FILED July 27, 2004

75/725,816 - IVIEWIT.COM June 8, 1999 FILED July 27, 2004

75/725,816 - IVIEWIT June 8, 1999 FILED July 27, 2004

75/725,817 - IVIEWIT.COM June 8, 1999 FILED July 27, 2004

75/725,817 - IVIEWIT June 8, 1999 FILED July 27, 2004

75/725,818 - IVIEWIT.COM June 8, 1999 FILED July 27, 2004

75/725,819 - THE CLICK HEARD 'ROUND THE WORLD June 8, 1999 FILED July 27, 2004

75/725,819 - IVIEWIT.COM June 8, 1999 FILED July 27, 2004

75/725,820 - IVIEWIT.COM June 8, 1999 FILED July 27, 2004

75/725,821 - IVIEWIT June 8, 1999 FILED July 27, 2004

75/725,821 - THE CLICK HEARD 'ROUND THE WORLD June 8, 1999 FILED July 27, 2004

75/725,822 - IVIEWIT June 8, 1999 FILED July 27, 2004

75/725,823 - IVIEWIT June 8, 1999 FILED July 27, 2004

75/725,823 - THE CLICK HEARD 'ROUND THE WORLD June 8, 1999 FILED July 27, 2004

76/037,700 - IVIEWIT.COM May 1, 2000 FILED July 27, 2004

76/037,701 - A SITE FOR SORE EYES May 1, 2000 FILED July 27, 2004

76/037,702 - A SITE FOR SORE EYES May 1, 2000 FILED July 27, 2004

76/037,703 - IVIEWIT May 1, 2000 FILED July 27, 2004

76/037,843 - IVIEWIT LOGO May 1, 2000 FILED July 27, 2004

76/037,844 - May 1, 2000 FILED July 27, 2004

# List of Wills/Trusts – Known & Unknown

1. Simon L. Bernstein Amended and Restated Trust Agreement Dated July 25, 2012;
2. Simon Bernstein Trust Agreement Dated May 20th 2008;
3. SIMON L. BERNSTEIN IRREVOCABLE TRUST AGREEMENT (2008);
4. SIMON BERNSTEIN IRREVOCABLE TRUST U/A 9/7/06;
5. SIMON BERNSTEIN IRREVOCABLE INSURANCE TRUST DATED 6/21/1995;
6. SIMON BERNSTEIN 2000 INSURANCE TRUST (dated August 15, 2000);
7. Simon Bernstein 2008 Will;
8. Simon Bernstein 2012 Will;
9. Shirley Bernstein Trust Agreement Dated May 20th 2008
10. SHIRLEY BERNSTEIN IRREVOCABLE TRUST U/A 9/7/06;
11. SHIRLEY BERNSTEIN IRREVOCABLE TRUST AGREEMENT (2008);
12. SHIRLEY BERNSTEIN 2000 INSURANCE TRUST (DATED AUGUST 15, 2000);
13. Shirley Bernstein 2008 Will;
14. Trust f/b/o Joshua Bernstein under the Simon L. Bernstein Trust dtd 9/13/2012;
15. Trust f/b/o Daniel Bernstein under the Simon L. Bernstein Trust dtd 9/13/2012;
16. Trust f/b/o Jake Bernstein under the Simon L. Bernstein Trust dtd 9/13/2012;
17. ELIOT, JILL & LISA BERNSTEIN FAMILY TRUSTS DATED MAY 20, 2008;
18. DANIEL BERNSTEIN IRREVOCABLE TRUST DATED SEPTEMBER 7, 2006;
19. JAKE BERNSTEIN IRREVOCABLE TRUST DATED SEPTEMBER 7, 2006;
20. JOSHUA Z. BERNSTEIN IRREVOCABLE TRUST DATED SEPTEMBER 7, 2006;
21. DANIEL BERNSTEIN IRREVOCABLE TRUST 07-JUL-10 049738;
22. JAKE BERNSTEIN IRREVOCABLE TRUST 07-JUL-10 0497381;
23. JOSHUA Z BERNSTEIN IRREVOCABLE TRUST 07-JUL-10 0497381;

Will of Simon Bernstein dtd May 20, 2008

PR's Shirley and William Stansbury

Simon Bernstein Trust Agreement dtd May 20, 2008

Shirley Trustee and William Stansbury

Shirley Bernstein Trust Agreement dtd. May 20, 2008

Will of Shirley Bernstein dtd May 20, 2008

Simon Trustee and Ted Successor

Simon PR and Ted Successor

Will of Simon Bernstein dtd July 25, 2012

Robert Spallina, Esq. & Donald Tescher, Esq. CO-PR

Ted Attorney's Robert Spallina, Esq. & Donald Tescher, Esq. are removed after fraud.  
JUDGE Appoints Ted as Successor PR

Simon L. Bernstein Amended And Restated Trust Agreement dtd July 25, 2012

Robert Spallina, Esq. & Donald Tescher, Esq. CO-TRUSTEES

After Removal for Fraud Ted Attorney's Robert Spallina, Esq. & Donald Tescher, Esq. Appoint Ted as Successor despite language that states Ted is predeceased and Successor cannot be related to Simon