

## **Kimberly Moran**

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**From:** Kimberly Moran  
**Sent:** Monday, October 17, 2011 10:02 AM  
**To:** 'Diana Banks'  
**Cc:** Robert Spallina  
**Subject:** Simon L. Bernstein Irrevocable Trust  
**Attachments:** Bernstein Itr to Wilmington Trust Company dtd 10-17-11.pdf

Hi Diana –

Attached is the letter for Mr. Bernstein to sign and send to Wilmington Trust Company regarding distribution of the assets held by the above referenced trust.

Robert asked that you please send us the most recent statement for Bernstein Holdings, LLC.

If you have any questions, please do not hesitate to contact us.

Best regards,

**Kimberly Moran, Legal Assistant**  
**Tescher & Spallina, P.A.**  
4855 Technology Way, Suite 720  
Boca Raton, FL 33431  
Tel: (561) 997-7008  
Fax: (561) 997-7308

**Simon L. Bernstein  
7020 Lions Head Lane  
Boca Raton, Florida 33496**

October 17, 2011

Wilmington Trust Company  
Attn: Ms. Carece Rufe, CTFA  
1100 North Market Street  
Wilmington, DE 19890-0001

**Re: Simon L. Bernstein Irrevocable Trust**

Dear Ms. Rufe:

I am the settlor and the beneficiary of the above-referenced Trust of which Mr. William Stansbury is named as the Trust Protector. At the time that I established the Trust in 2008, I funded the Trust with my partnership interest in Bernstein Investments, LLLP, for asset protection purposes. Three years have passed since the establishment of the Trust and I am no longer in need of the protections afforded by the Trust. Whereas the primary purpose of the Trust is now obsolete, I formally request that you distribute the assets held by the Trust to my revocable trust and terminate the Simon L. Bernstein Irrevocable Trust immediately thereafter.

As was requested, I have enclosed a copy of the latest brokerage statement for Bernstein Family Investments, LLLP. If you have any questions regarding the distribution from the Trust or the Trust's termination, please do not hesitate to contact me.

Sincerely yours,

Simon L. Bernstein

Enc.

Simon L. Bernstein  
7020 Lions Head Lane  
Boca Raton, Florida 33496

August 26, 2011

Wilmington Trust Company  
ATTN: Ms. Carece Rufe, CTFA  
1100 North Market Street  
Wilmington, DE 19890-0001

RE: Simon L. Bernstein Irrevocable Trust

Dear Ms. Rufe:

I am the settlor and the beneficiary of the above-referenced Trust of which Mr. William Stansbury is named as the Trust Protector. At the time that I established the Trust in 2008, I funded the Trust with my partnership interest in Bernstein Family Investments, LLLP, for asset protection purposes. Three years have passed since the establishment of the Trust and I am no longer in need of the protections afforded by the Trust. Whereas the primary purpose of the Trust is now obsolete, I formally request that you distribute the assets held by the Trust to my revocable trust and terminate the Simon L. Bernstein Irrevocable Trust immediately thereafter.

As was requested, I have enclosed a copy of the latest brokerage statement for Bernstein Family Investments, LLLP. If you have any questions regarding the distribution from the Trust or the Trust's termination, please do not hesitate to contact me.

Sincerely yours,

SIMON L. BERNSTEIN

Encl.



- ask Diana or Rachel  
Need most recent  
LLC Stmt  
- retyp HR & send to  
Simon Bernstein

TS000122



WILMINGTON  
TRUST

Wilmington Trust Company  
Rodney Square North  
1100 North Market Street  
Wilmington, DE 19890-0001

June 29, 2011

William E. Stansbury  
6920 Capiro Lane  
Boynton Lane, FL 33437

RE: Simon L. Bernstein Irrevocable Trust

Dear Mr. Stansbury:

In the past year, I took over the administration of the above referenced trust. I am contacting you because you are currently named as the Trust Protector of Mr. Bernstein's Delaware Asset Protection Trust. I am concerned because I have tried on several occasions to contact Mr. Bernstein to no avail. As Trustee there are a few outstanding items that we require to continue to serve as Trustee. Would you be able to help me get in contact with Mr. Bernstein to resolve the outstanding items? Any help that you could provide would be greatly appreciated.

If you need additional information, please do not hesitate to ask. All of my contact information is below.

Kind Regards,

Ms. Carece Rufe, CTFA  
Fiduciary Advisor  
Wealth Advisory Services  
[crufe@wilmingtontrust.com](mailto:crufe@wilmingtontrust.com)  
302-651-8248

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