



LAW OFFICES OF
**MEROS, SMITH, BRENNAN,
BRENNAN & GREGG, P.A.**

757 Arlington Avenue North
St. Petersburg, Florida 33701

PETER N. MEROS*
WALTER E. SMITH*†
KEVIN D. BRENNAN^
CHRISTIN C. BRENNAN~
STEPHEN GREGG^

*Board Certified Civil Trial Lawyer

† Board Certified Business Litigation Lawyer

^Board Certified Marital and Family Law Lawyer

/Florida Supreme Court Certified Mediator

~ Florida Supreme Court Certified Family Mediator

Please respond to:

Christin C. Brennan

P. O. Box 27

St. Petersburg, FL 33731

Telephone (727) 822-4929

Fax (727) 821-7140

E-Mail: cbrennan@msbbg-law.com

Kristina Montalvo, Paralegal, Ext. 4

E-Mail: Assistant@msbbg-law.com

June 25th, 2024

Delivery via E-mail

Alan S. Rosenthal, Esquire
Rosenthal Law Group P.A.
3909 Central Avenue
St. Petersburg, FL 33713

Re: Weston v. Spence/Case No.: 21-000651-FD-12

Dear Al:

Pursuant to the Partial Agreement dated March 1st, 2022, Amendment to Partial Agreement dated June 24, 2022, and the Partial Final Judgment of Dissolution of Marriage dated June 24th, 2024, Ms. Spence is to receive 100% of the Husband's Nationwide Soitec Retirement, 100% of his Kioxia – T Rowe Price 401(k), and 34.3% of his Fidelity Roth IRA.

The Amendment to partial agreement notes that Mr. Weston does not believe QDROs will be needed to transfer any of these assets. His understanding would seem correct to me at least as it relates to the Roth IRA, so I ask that you please have Mr. Spence execute the necessary documentation to complete the required transfers these funds by July 2nd, 2024. For your convenience, I enclose Fidelity's form entitled "Transfer Due to Divorce," which we have filled out, but Simon would need to execute. Please note that the instructions indicate that since the amount to transfer would be over \$100k, a "medallion signature guarantee," is required unless both parties wish to execute the document together at a fidelity branch. Ms. Spence is fine with this if it is Mr. Weston's wish, just let us know and we can pick a mutually convenient time for next week (I assume an appointment would likely need to be made, but I am hopeful the parties could select this together without our assistance).

Unfortunately, if we are not able to accomplish at least the Roth Transfer paperwork by the requested time, I will need proceed with requesting Matt Lundy, Esq. begin the initial preparation of the QDROs and/or letter of instructions as set forth in the parties' agreements and Partial Final Judgment so Ms. Spence will have adequate funds to prepare for trial as was intended.

Thank you for your continued attention to this matter. I look forward to hearing from you soon.

Sincerely,

A handwritten signature in black ink, appearing to read 'C. Brennan', with a stylized flourish at the end.

Christin C. Brennan

cc: Heather Spence
Enclosures