
From: Halperin, Alan S <[REDACTED]>
Sent: Tuesday, April 14, 2015 6:18 PM
To: jeffrey E.
Subject: Paralegal Secondment

Jeffrey, please let me provide you with a timeline and a description of projects.

A. Timeline

1. On Tuesday, February 24th, Brad requested a paralegal "to review and organize some files on all of our inter-entity notes that currently exist or might have existed in the last 36 months." In response to my inquiry as to how long the person would be needed, Brad responded that he hoped it would take three to four days.
2. As we sought to locate the appropriate paralegal with the requisite skills, our assistant manager of corporate paralegals, Danielle Martin, coordinated with Ada. We asked for starting and ending dates. Ada suggested that the paralegal start on February 26th and conclude on March 6th.
3. We arranged for Will Holstrom, a recent college graduate, to report to Elysium on Thursday, February 26th.
4. On Friday, March 6th, Ada and Rich Drago advised Will that they would need him to work on the following Monday and Tuesday, March 9th and 10th.
5. On March 10th, Ada advised Will that he would be needed through March 20th.
6. At that point, we realized that, given the extended stay, we needed to have a formal secondment letter. I therefore sent a letter, on March 13th, memorializing the understanding that Elysium seconded Will, commencing on February 26th and continuing through March 20th. We agreed to charge Elysium our cost (\$5,262 per month), rather than Will's billable rate of \$245 per hour.
7. On March 19th, Will reminded Ada that his last day would be March 20th. She asked Will if he would be willing to stay longer. He indicated that, as he enjoys his Paul, Weiss job, he would like to return. Ada asked whether he would be in a position to complete the existing projects by the following day, and he confirmed that he would be able to do so. He completed the open projects.

B. Projects

1. Will created a spreadsheet of all of the intra-family notes, mostly involving the trusts. I am told there were approximately 8 notes. Once the spreadsheet was completed, Will located bank statements or other back-up materials to match up with the numbers in the spreadsheet. This was the main project.
2. Will created several structure charts, all for the same entities, but reflecting different information (for example, managers, officers and flow of funds).
3. Will also scanned and filed documents, as requested.

Alan

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