
From: jeffrey E. <jeevacation@gmail.com>
Sent: Wednesday, December 16, 2015 7:19 PM
To: Kathy Ruemmler
Subject: Re:

tell her to take as much long term loss as needed to offset the long term gain

On Wed, Dec 16, 2015 at 2:14 PM, Kathy Ruemmler [REDACTED]
> wrote:

Sent from my iPhone

Begin=forwarded message:

From: [REDACTED]
=b>Date: December 15, 2015 at 3:12:46 PM EST
To: Kathy Ruemmler [REDACTED]
[REDACTED]

=div>

Hi Kathy

Enclosed you will find taxable dividends, interest, =nd realized gain/loss booked through the beginning of this week.=/u>

There are a few moving parts however:<=p>

1) ♦=A0 Capital gains which are not reflecting on the report but are =stimated to pay this month are roughly 12,000-13,000. (mostly long t=rm)

2) ♦=A0 Possible losses we could take as of last night's clos=ng:

- a. =C2◆ Short term 9600.00
- b. =C2◆ Long term 11,300
- c. =C2◆ Sun America I won't know what the adjusted loss=we could book is until Thursday. It's a stepped up loss whic= is adjusting over the next few days, so I should have a figure by Thursda=.

I would be happy to review this via phone. If =ou do want to make any changes we will need to speak over the phone for I =an't take email instruction.

Thanks

Danielle

202 434 4732 <tel:202%20434%204732>

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=lease note

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