
From: jeffrey E. <jeevacation@gmail.com>
Sent: Friday, October 16, 2015 11:08 AM
To: Melanie Spinella

I think you should consider the fact that your family office will be the most central component of what you leave to your children, wife heirs. It is the core of your assets. Your art might be sold. Your houses may lie empty, the Apollo stock could be sold. You will pass on your office, it will be the primary player in your estate tax, probate, transition. Brad has taken it from a D minus to a C minus. If I were you I would set the goal of an A. just like your paintings. Like a house you could attempt to renovate it. It will take more time and money. or. in essence as I suggested in 2013, start from scratch. A financial head of office. Brad could move to being Richards replacement as trustee. Barry Cohen would be perfect but carries the trustee pain now. take a tax partner from a major firm. To replace Joslin, cost 1+ million. keep Heath and Samantha. bring in full time IT person. ASAP. Your lighting contractor in your new townhouse has better IT than your multi billion dollar antique operation. Data breaches are not your concern. precision is. either redo the office layout. or get entirely new space. the proposals to focus on following on a monthly basis the values of all your current investments is an example of misplaced priorities. Your office is the heart of the family's financial life and temp future, it needs a heart operation

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