
From: jeffrey E. <jeevacation@gmail.com>
Sent: Wednesday, May 13, 2015 1:04 PM
To: Melanie Spinella
Subject: Fwd: jobs ahead

the list that we discussed.. i spent time with brad= again. re the candidates . fiiling due, thi= week, next month, .

----- Forwarded message -----

From: jeffrey E.<=> <jeevacati=n@gmail.com <mailto:jeevacation@gmail.com> >
Date: Sun, Dec 28, 2014 at 5:18 AM
Subject: jobs ahead
To: Brad Wechsler <[REDACTED]> Melanie Spinella
<[REDACTED]> Ada Clapp <[REDACTED]>

1. review accounting system. Book keeping softaw=re. staff, (senior accountant) methods on line banking, bro=erage. cash mgmt. airplane reimbursement. boat sale. art purchases sales =C2 use and sales tax. tax filings FBAR FATCA, gaming commsi=n, pfics, insurance . uk co law.
2. review docs for TRA BR= grats, trusts, heritage will, insurance, art lending. medical, spri=ging powers. two fire drill books. one needed for =njury. other for death
- 3 review bills . boats , planes, =A0 legal, (PW, McFarlands all outside. legal and accoun=ing. Toms bills over 400k . house projects. south ny ben
- 4 cashflow projections tax projecti=ns , interaction with Apollo accounting tax, Phaidon ,art space ,and=Regan. legal accounting. audit
5. children meetings ,=C2 review to date and allocations
- 6 review all role=in payables. files scanned, no paper
- 7 review invesmtents fo= tax basis and unrecognized gain
- 8 schedule of all hedge fun=s . redeemables commitments etc.
- 9 charities =A0 pledges strucutre, staff ,

<=iv>--

=please note

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