
From: jeffrey E. <jeevacation@gmail.com>
Sent: Friday, March 20, 2015 1:23 AM
To: Brad Wechsler
Subject: Re:

easter

On Thu, Mar 19, 2015 at 4:37 PM, Brad Wechsler <████████<mailto:████████>> wrote:

MEMORANDUM

TO= ██████████ =C2 =A0 =C2 Cc: =A0 Jeffrey Epstein
=C2 =A0 =C2 =A0 =C2 =A0 =C2 Cc: =A0 Tom Turrin
=C2 =A0 =C2 =A0 =C2 =A0 =C2 Cc: =A0 Rich Joslin
FR=M: Brad Wechsler

DA=E: March 19, 2015

I just completed my tax meeting with Tom and Rich. There were three key issues: (i) who does what (i.e., who prepares the returns de novo and who reviews, all in the context of Tom signing the returns); (ii) the mechanics of data preparation and sharing (in the context of Rich's belief that you get a higher degree of output accuracy if you disaggregate different categories of income or expense that software often combines); and (iii) establishing a time line that meets Rich's, Tom's, Alan D's and Jeffrey's needs.

1. =AO Rich will prepare, Tom will review.
2. =AO Rich will have materials to Tom by the end of next wee= in BNA projection format. (Obviously, the big number is Apollo which Rich=should have Monday. He will then chase down his best estimates of other in=ome and expense for the rest of the week.
3. =AO Tom will spend weekend of 3/28, 3/29 reviewing and the= conferring with Rich on 3/30 and 3/31.
4. =AO Materials will be delivered to Alan D by 4/3, which sh=uld give adequate time for review by Alan and Jeffrey.

Re=ember this is all in the context of filing for an extension. This means we=will use our best estimates for 2014 and insert a buffer to make certain w= are 100% paid-in. We will also be paying 2015 Q1 estimates.

On=a different note, Tom believes he has forwarded to Jeffrey 2014 final gift=tax returns and Rich and Tom will also have completed final returns for th= children by 4/15.

Jeffrey, please comment if anything appears problema=ic to you.

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please =ote

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