
From: Brad Wechsler <[REDACTED]>
Sent: Friday, March 20, 2015 3:53 PM
To: Jeffrey Epstein; Melanie Spinella
Subject: Re:

We'll follow your lead. Speak next week. B Sent from my Verizon Wireless BlackBerry

From: jeffrey E. <jeevacation@gmail.com>
Date: Fri, 20 Mar 2015 09:30:35 -0600
To: Brad Wechsler<[REDACTED]>; Melanie Spinella<[REDACTED]>
Subject: Re:

at a minimum we should go on extention as well for gift taxes . talk next week,

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

MEMORANDUM

TO: [REDACTED]
Cc: Jeffrey Epstein
Cc: Tom Turrin
Cc: Rich Joslin
FROM: Brad Wechsler

DATE: 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's 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.

Results

1. Rich will prepare, Tom will review.
2. Rich will have materials to Tom by the end of next week 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 income and expense for the rest of the week.
3. Tom will spend weekend of 3/28, 3/29 reviewing and then conferring with Rich on 3/30 and 3/31.
4. Materials will be delivered to Alan D by 4/3, which should give adequate time for review by Alan and Jeffrey.

Remember 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 we 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 the children by 4/15.

Jeffrey, please comment if anything appears problematic to you.

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please note

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