
From: jeffrey E. <jeevacation@gmail.com>
Sent: Sunday, December 28, 2014 10:18 AM
To: Brad Wechsler; Melanie Spinella; Ada Clapp
Subject: jobs ahead

1. review accounting system. Book keeping software. staff, (senior accountant) methods on line banking, brokerage. cash mgmt. airplane reimbursement. boat sale. art purchases sales use and sales tax. tax filings FBAR FATCA, gaing commision, pfics, insurance . uk co law.
 2. review docs for TRA BRH grats, trusts, heritage will, insurance, art lending. medical, springing powers. two fire drill books. one needed for injury. other for death
 - 3 review bills . boats , lanes, legal, (PW, McFarlands all outside. legal and A0 accounting. Toms bills over 400k . house projects. south ny=ben
 - 4 cashflow projections tax projections , interaction with Apollo accounting tax, Phaidon ,art space ,and Regan. legal accounting. audit
 5. children meetings , review to date and allocations
 - 6 review all=C2 role in payables. files scanned, no paper
 - 7 review investments for tax basis and unrecognized gain
 - 8 schedule of all= hedge funds . redeemables commitments etc.
 - 9 charities pledges structure, staff ,
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