
From: Eileen Alexanderson [REDACTED]
Sent: Thursday, August 29, 2013 10:16 PM
To: 'Jeffrey Epstein'
Subject: CFO candidates

See follow up note below from Rich Joslin.

I went to lunch with Lisa Cappiello today in order to spend a bit more time with her and get to know her better. Very, very capable-in many ways would be a great fit. I know the former CIO from Caxton-they worked together for 20 years there - checking on her with him. I still think Rich is the smarter of the two. I am having breakfast with him tomorrow, will let you know my thoughts.

-----Original Message-----

From: Richard Joslin [mailto:[REDACTED]]
Sent: Thursday, August 29, 2013 10:24 AM
To: Eileen Alexanderson, [REDACTED]
Cc: Philip Strassler
Subject: Rich Joslin follow

Eileen/Ada:

I wanted to extend my gratitude for the opportunity to meet with you and the continued dialogue regarding Black Family Partners. It is an extraordinary opportunity and I posit that my "mad scientist" passion for taxes and staying abreast of tax developments and latest thinking, coupled with a solution-based, flexible mindset and a wide range of experience and familiarity with HNW/financial products/services can provide a most fertile ground for creative and effective tax planning.

And of course I am very detail-oriented and perfectly content to be in the trenches and weeds with team members and hold paramount the interests of the firm/family.

Given the interest in art/collectibles and the mention of Sec 1031 (tax deferral), I have been thinking about tax recognition vs realization and sec 1(h)(5)(B) and how a vehicle might be used to convert 28% collectible gain into a 20% entity sale gain. I am also looking into how collectibles might fall outside of PFIC and foreign personal holding company rules. While deferral may be optimal, ensuring the lowest tax rate is a near second. And I am keeping in mind how this planning might be adversely affected by sales tax transfer rules. A work in progress..

Last, there is a Bloomberg/BNP Sept Advisory Board meeting with agenda of EGT (see below) and was looking to see if you might be interested in joining me. The third item looks relevant. Usually there are articles for publication and speakers present in tandem albeit papers have not yet been released. Gratis.

I hope the new office set up is going smoothly. Sounds exciting.
.Would love to help..

Best
RJ

>>>>>

Thursday, September 26, 2013, Bloomberg Tower, New York
Agenda: Estates, Gifts and Trusts

1. When Old and New Worlds Collide: Traditional Planning and the Daunting Challenges of Digital Assets, by Susan Porter, Fiduciary Consultant, New York, New York, and Jill Choate Beier, Assistant Professor, Marymount Manhattan College, New York, New York 2. Trust Prevails on Commerce Clause Challenge to Pennsylvania's Taxation of Trust Income, by Mark E. Wilensky, Meltzer, Lippe, Goldstein & Breitstone, LLP, Mineola, New York 3. Key Issues for Collectors: Working with Museums, Dealers and Auction Houses, by Richard M. Horwood, Horwood Marcus & Berk Chartered, Chicago, Illinois

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