
From: jeffrey E. <jeevacation@gmail.com>
Sent: Saturday, November 4, 2017 4:49 PM
To: Valeria Chomsky
Subject: Re: Chomsky invoices and statements - As requested (more info)

gene . please prepare a suitable complaint. re=milenium. it is outrageous

=div class="gmail_quote">On Sat, Nov 4, 2017 at 12:06 PM, Valeria Chomsky [REDACTED] wrote:

=div dir="ltr">>

Some more pieces for the puzzle. Interestingly, although Katz (Bainco) states that Noam receives a hard copy of Pershing monthly statements, we never received them in our address in Cambridge. And Noam was never informed about how to access the Millennium statements via e-delivery.

Weird.

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

From: Robert Katz <[REDACTED] <mailto:[REDACTED]>>
Date: Wednesday, Aug 9, 2017 at 3:37 PM
Subject: Chomsky invoices and statements - As requested
To: Gene Landy [REDACTED] >
Cc: Valeria Chomsky [REDACTED] > =Noam Chomsky
<=chomsky3@gmail.com> [REDACTED] Sam Bain [REDACTED]
>, Isabel Scharmer [REDACTED] Kathleen O'Malley [REDACTED] m
<mailto:[REDACTED]>, Robert Katz [REDACTED] >

<=r>

Gene -

As requested please see the attached invoices for 2016 for Noam's retirement accounts at year-end. Additionally, Noam elected to have the Millennium statements (Quarterly) sent to him via e-delivery and the Pershing statements (monthly) are hard copy to his home in Cambridge. <=>

Best regards,

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Robert Katz, CFP®

Wealth Strategies, Managing Director,=Partner

699 Boylston Street | 10th Floor | Boston, MA 02116

www.bainco.com <<http://www.bainco.com/>>

=span style="font-size:10.0pt;font-family:"Liberation Sans";text-decoration:none">>/span>
<<https://www.bainco.com/bainco-named-2017-financial-times-300-top-registered-investment-advisers/>>

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Hello Robert,

This is just a short note to confirm our discussion today.

You will be supplying the 2016 year-end statement for Millennium in addition to the Pershing statement and will confirm that both are routinely supplied to our clients.

You will also kindly be supplying Bainco and other relevant fee information=as of 2016 year end for each of the relevant accounts.

If we need additional information, I will let you know.

Thanks for your help.

Best,

Gene

Ge-e Landy

Ruber=o, Israel & Weiner, P.C.
Chair, Technology Business Group

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=A0 please note

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