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**From:** Eileen Alexanderson [REDACTED] >  
**Sent:** Saturday, October 26, 2013 7:32 PM  
**To:** 'jeevacation@gmail.com'  
**Subject:** Forwarded from my home email

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

From: Tom & Eileen [mailto:[REDACTED]]  
Sent: Saturday, October 26, 2013 03:30 PM Eastern Standard Time  
=o: Eileen Alexanderson  
Subject: Additional thoughts

Just a follow up to our conversation yesterday - There has certainly been a= issue of timeliness with Alan and maybe a push from Karp changes that. As=I said to you yesterday, maybe Alan's client load needs to be narrowed to =nable him to service Leon Properly. We have questioned whether Alan is "sm=rt" enough and "well equipped" enough in terms of level of his planning ex=erience but, thinking more about what has transpired during the past sever=I months, I would like to suggest maybe we need to think about this a litt=e differently.

Maybe the greater issue is difference of style. We knew Alan was a conserva=ive practitioner when we hired him. I believed that would be a complement =o your style but I am feeling like, instead, it has created conflict. Yes,=in a few cases, the 'delay' may have been a function of Alan not having se=n certain things done the way you've suggested (raising the issue of wheth=r he has sophisticated enough planning skills for a client like Leon) but =ore often, I believe, he was conversant but disagreed, and the delay was a=function of time spent by Alan to research further to decide whether he co=ld come around to agree with your plan. My observation would be that both =lan and Ada are well able to hold there own when in debate with you which,=in itself, speaks well for both of them given the level at which you opera=e. I've told you previously that I am a great believer in a dialog of cons=uctive criticism getting a team to the best possible decision. Somehow, o=r dialogs just seem more painful for both sides than they need to be. I kn=w sometimes the dialog is necessary just for you to get Alan where he need= to be on a subject, and sometimes I think Alan knows he is waging a losin= battle. I think Ada and Alan are very similar stylistically. I may be on =hin ice here (without any legal background) but from my perspective, I'm n=t sure Alan brings a much higher level of expertise than we have with Ada.=If we are going to pay for outside counsel that is something we should be =ooking for.

Having just presented the thought that maybe the issue is style rather than=smarts, I must admit that the fact that the quality of drafting in the doc=ments we received for the new GRAT and related trusts has been lacking, we=can't dismiss the issue of "how well equipped". I know you said these are =he sorts of documents that should reflect Alan's longtime efforts to craft=a good document that is then ready to go when needed. You are the better j=dge, but it seems to me we did not have the same quality issues in the doc=ments we received in the planning steps earlier this year related to the s=bstitution, will, etc.

To me, there is sort of a journey that you travel getting to a good working=relationship with Leon. I've traveled that path, and I see Ada doing that =urrently. Maybe Alan is just doing the same thing but I am not so sure. I =eel more like you and Leon should be deciding NOW whether you believe Alan=can service Leon's needs because, In my opinion, it is not fair to ask Ala= to rearrange his book of business for us if you already believe he is not=up to the job. I will tell you Alan has put tremendous effort into servici=g us and maybe a kick in the butt from Karp prompts Alan to move to the ne=essary level and this all works out fine. Personally, as a Manager, I've n=ver believed you are doing someone a favor by keeping them in a job they d=n't belong in. Maybe we need to consider moving on after this leg of the p=anning. I am not completely sure, I just know this is almost torturous. Af=er one of his recent meetings with Leon, Alan said to me "I

am not used to=having unhappy clients." Remember, he came well recommended by people Leon=respects but Leon is not the typical UHNW client. This is someone's career=we are dealing with, and likewise, for Leon, this is of the utmost importa=ce for him and his family. Working with Leon is a great opportunity but it=is not for everyone.

I send this in the spirit of providing good food for thought.

Best, Eileen

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