
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
to: Eileen Alexanderson
Subject: Additional thoughts

Just a follow up to our conversation yesterday - There has certainly been an 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 enable him to service Leon Properly. We have questioned whether Alan is "smart" enough and "well equipped" enough in terms of level of his planning experience but, thinking more about what has transpired during the past several months, I would like to suggest maybe we need to think about this a little differently.

Maybe the greater issue is difference of style. We knew Alan was a conservative practitioner when we hired him. I believed that would be a complement to 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 seen certain things done the way you've suggested (raising the issue of whether he has sophisticated enough planning skills for a client like Leon) but more 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 could come around to agree with your plan. My observation would be that both Alan and Ada are well able to hold their own when in debate with you which, in itself, speaks well for both of them given the level at which you operate. I've told you previously that I am a great believer in a dialog of constructive criticism getting a team to the best possible decision. Somehow, our dialogs just seem more painful for both sides than they need to be. I know sometimes the dialog is necessary just for you to get Alan where he needs to be on a subject, and sometimes I think Alan knows he is waging a losing battle. I think Ada and Alan are very similar stylistically. I may be on thin ice here (without any legal background) but from my perspective, I'm not 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 looking 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 documents 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 the 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 judge, but it seems to me we did not have the same quality issues in the documents we received in the planning steps earlier this year related to the substitution, 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 currently. Maybe Alan is just doing the same thing but I am not so sure. I feel 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 Alan 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 servicing us and maybe a kick in the butt from Karp prompts Alan to move to the necessary level and this all works out fine. Personally, as a Manager, I've never believed you are doing someone a favor by keeping them in a job they don't belong in. Maybe we need to consider moving on after this leg of the planning. I am not completely sure, I just know this is almost torturous. After 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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