
From: Vincenzo Iozzo [REDACTED]
Sent: Tuesday, July 17, 2018 9:53 PM
To: jeevacation@gmail.com
Subject: Layer1 investment / request for feedback

Hello,

Jeremy sent the layer1 investment to me and I like the opportunity. I'm thinking about investing and bringing in these guys as well (I co-invest with them or invest on their behalf on selected deals): <https://www.villageglobal.vc/>
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One area that I'm a bit concerned about is the track record of the founders, their work history seems a little erratic. I'm planning on digging more on that at the next clam but I was wondering if you could give me your take on that/the founders once you talk to them?

On the positive side I think there are three main points:

1) the investment it's in the management company, not the SPV itself. Hence even if grin is a bust they can try with another currency. (I don't think I'd invest in the SPV)

2) every tech crypto person I asked seems very excited about grin, so it seems a good patient 0 to try this strategy/model on

3) a very similar model seems to work quite well for zcash and chaincode labs on bitcoin

Thank you,
Vincenzo

<div id="AppleMailSignature">Sent from my iPhone

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