
From: Vincenzo lozzo [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 thinkin= about investing and bringing in these guys as well (I co-invest with them/=nvest on their behalf on selected deals): <https://www.villageglobal.vc/> <<https://www.villa=eglobal.vc/>>

One=area that I'm a bit concerned about is the track record of the foun=ers, their work history seems a little erratic. I'm planning on dri=ling more on that at the next clam but I was wondering if y=u could give me your take on that/the founders once you talk to them? =/div>

On the positive side I think there are three main p=ints:

- 1) the investment it's in the manageme=t company, not the SPV itself. Hence even if grin is a bust they can try wi= another currency. (I don't think I'd invest in the SPV)<=/pan>
- 2) every tech crypto person I asked seems very excited about grin, so it s=ems a good patient 0 to try this strategy/model on
- 3) a very similar mod=l seems to work quite well for zcash and chaincode labs on bitcoin

Thank you,
Vincenzo

<=iv id="AppleMailSignature">Sent from my Iphone

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