
From: jeffrey E. <jeevacation@gmail.com>
Sent: Monday, June 11, 2018 8:40 PM
To: Paul Barrett; Rich Kahn
Subject: Re: Meeting

No rush. , have fun

On Mon, Jun 11, 2018 at 2:37 PM Paul Barrett <=a href="mailto:[REDACTED]">

Ok. Understood.

If you want me back in NY I will fly home tomorrow instead of Wednesda=.

Paul Barrett

Alpha Group Capital LLC

142 W 57th Street, 11th Floor, New York, NY 10019

[REDACTED]

[REDACTED]

On Jun 11, 2018, at 4:30 PM, jeffrey E. <jeevacation@gmail.com <mailto:jeevacation@g=ail.com>> wrote:

I understand . Will talk tomorrow. You were e=pected to get info and input from the best traders. Not firmwide rec=mmendation s that tge plumber in ohio reads and reviews. You cannot=be an analyst of sectors and manage money. People live and breathe e games . Others china. . This is not useful to spend t=me learning

On Mon, Jun 11, 2018 at 2:25 PM Paul Barrett <mailto:[REDACTED]> &g=; wrote:

I will hold off on doing anything in the portfolio (other than selli=g something) until we meet.

The overall portfolio as of today is up ~\$4mm before my fees. So \$3m= after fees. It was my understanding that I would own the P/L of everythin= from Oct 1st. As a result I never differentiated between what I decided to keep and what I initiated=when thinking about the overall portfolio return. I owned the performance = everything equally. I figured that if the portfolio was down due to lega=y positions there would be no free pass.

As you think about things going forward I am happy to have position =ize limits (Min and Max), stop loss requirements (except maybe if we have = structured note with very deep buffers) and have more concentrated thematic bets.

Again I am happy to fly and meet you wherever you are to discuss.

Paul

Paul Barrett

Alpha Group Capital LLC

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646-876-5277 <tel:6=6-876-5277> (o) 646-342-6930 (c) <=u>

[<=a>](mailto:paul@alphagroupcapital.com)

On Jun 11, 2018, at 10:50 AM, jeffrey E. <jeevacation@gmail.com> <<mailto:jeevacation@=mail.com>> wrote:

it will wait, im unsure at them moment I want to review in=detail . it appears that if i were to include your 1 m loan ,=C2♦ we are at breakeven after all this time ? od=

On Mon, Jun 11, 2018 at 8:47 AM Paul Barrett <paul@alphagroupcapital.com> <<mailto:pau=@alphagroupcapital.com>> &g=; wrote:

Jeffrey

I really want this to work and need your input as to=how you want me to operate going forward.

I can fly this afternoon to meet with you. Let me if you are in the States and have time.

Paul

Paul Barrett

Alpha Group Capital LLC

142 W 57 <<https://maps.google.com/?q=142+W+57&=entry=gmail&source=g>>
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