

Subject: RE: Virage--litigation finance [I]
From: Stewart Oldfield <[REDACTED]>
Date: Wed, 05 Jul 2017 17:07:18 -0400
To: Matt Glassman <[REDACTED]>

Cool. Slome is a guy in NY who manages his family \$ (and some external I think) in a fund of funds format. Loves consumer receivables, structure and high return.

From: Matt Glassman
Sent: Wednesday, July 05, 2017 5:06 PM
To: Stewart Oldfield <[REDACTED]>
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Lets sit down tomorrow morning, we can discuss a bit more.

From: Stewart Oldfield
Sent: Wednesday, July 05, 2017 4:54 PM
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I think we have quite a few people potentially interested in this. Not sure many of them have direct prior experience given the specific nature of the investment though.

Third Lake – looked at seeding the broader Virage fund via JPM. Knows them well

Southern Financial – generally looking for yield

Tisch – open to new managers. Return profile should be interesting

Willett – seeking 20% IRR, may not like the sector

Slome – interested in niche managers, non-correlated

Shamrock – looking for yield

JL squared – fund of funds, various levels of sector expertise given other PE experience

Caruso – looking for yield

Safanad – has healthcare expertise and wants yield. Generally focused on operating businesses and RE

Cliff Illig – knows healthcare system well

Georgetown Endowment – needs yield

General Atlantic – talk to Tazia

Elysium – always looking for yield

Blue Mountain/Feldstein – yield investor. Doesn't like paying carry
MSD?

Pacific Life?

Can probably think of a few others as we get into it more. Happy to sit down with you and go through a broader list so you get more familiar with the names.

From: Matt Glassman
Sent: Wednesday, July 05, 2017 4:39 PM
To: Stewart Oldfield <[REDACTED]>
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Starting to put together a draft list of folks interested in litigation finance/Virage deal potentially. Any of your guys come to mind who have invested in the space previously?

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