
From: Paul Morris [paul.morris@db.com]
Sent: 9/10/2014 5:58:02 PM
To: Mike Liebeskind [mliebeskind@wingedkeel.com]
CC: Brian Gartner [bgartner@wingedkeel.com]
Subject: Re: Richard Kahn: Private Placement Variable Annuity (PPVA) Investment Account

Classification: External Communication

Yes feel free to call him

From: Michael Liebeskind [mliebeskind@wingedkeel.com]
Sent: 09/10/2014 09:45 PM GMT
To: Paul Morris
Cc: Brian Gartner <bgartner@wingedkeel.com>
Subject: Richard Kahn: Private Placement Variable Annuity (PPVA) Investment Account

Paul,

I don't recall hearing back from Richard Kahn. Should I reach out to him for a status report?

Michael

From: Michael Liebeskind
Sent: Tuesday, June 10, 2014 1:24 PM
To: 'Richard Kahn'
Cc: 'paul.morris@db.com'; Brian Gartner
Subject: RE: Private Placement Variable Annuity (PPVA) Investment Account

Hi Rich,

How did the meeting with your Principal go?

Michael

From: Michael Liebeskind
Sent: Friday, June 06, 2014 1:34 PM
To: 'Richard Kahn'
Cc: 'paul.morris@db.com'; Brian Gartner
Subject: RE: Private Placement Variable Annuity (PPVA) Investment Account

There will be no estate taxes. The value of the PPVA Investment Account is included in the taxable estate, but there is a dollar-for-dollar estate charitable tax deduction.

From: Richard Kahn [mailto:richardkahn12@gmail.com]
Sent: Friday, June 06, 2014 1:30 PM
To: Michael Liebeskind