

**Cc:** Brian Gartner

**Subject:** Re: Private Placement Variable Annuity (PPVA) Investment Account

i do remember if we spoke about estate taxes  
if at death funds are going to charity are they out of your estate  
assume they are includable if individual has in his name at death  
please advise  
thank you

Richard Kahn  
HBRK Associates Inc.  
575 Lexington Avenue 4th Floor  
New York, NY 10022



On Jun 6, 2014, at 8:31 AM, Michael Liebeskind <[mliebeskind@wingedkeel.com](mailto:mliebeskind@wingedkeel.com)> wrote:

Rich,

It was a pleasure speaking with you. Good luck with your meeting.

Thanks to Paul for making the connection.

Michael

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**From:** Richard Kahn [<mailto:richardkahn12@gmail.com>]  
**Sent:** Thursday, June 05, 2014 8:58 PM  
**To:** Brian Gartner  
**Cc:** [paul.morris@db.com](mailto:paul.morris@db.com); Michael Liebeskind  
**Subject:** Re: Private Placement Variable Annuity (PPVA) Investment Account

Thank you both for your time this afternoon  
Conversation was very useful and I look forward to presenting PPVA to my principal  
I will be back in touch tomorrow or Monday  
Have a nice evening

Rich

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**From:** Brian Gartner <[bgartner@wingedkeel.com](mailto:bgartner@wingedkeel.com)>  
**Date:** Thu, 5 Jun 2014 22:43:14 +0000  
**To:** Richard Kahn <[richardkahn12@gmail.com](mailto:richardkahn12@gmail.com)>  
**Cc:** "[paul.morris@db.com](mailto:paul.morris@db.com)" <[paul.morris@db.com](mailto:paul.morris@db.com)>, Michael Liebeskind <[mliebeskind@wingedkeel.com](mailto:mliebeskind@wingedkeel.com)>  
**Subject:** Private Placement Variable Annuity (PPVA) Investment Account