

**From:** Perry Lerner <[REDACTED]>  
**To:** [REDACTED]  
**Cc:** jeffrey E. <jeevacation@gmail.com>, Chris Calise <[REDACTED]>  
**Subject:** RE: Meeting with Perry Lerner  
**Sent:** Monday, November 30, 2015 8:46:35 PM

Jeffrey-

Several months ago we met to discuss our private placement insurance products. We have recently been approached by several investment groups who are interested in using the PFIC headroom we create as a consequence of our ongoing business. That is, as we write policies, our equity owners can shelter their own investment earnings without becoming subject to current taxation. Please let me know if this subject is still of interest to you.

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**From:** Barry J. Cohen [mailto:[REDACTED]]  
**Sent:** Monday, September 15, 2014 2:28 PM  
**To:** [REDACTED]  
**Cc:** jeffrey E.; Perry Lerner; Kimberly Schroeder  
**Subject:** Meeting with Perry Lerner

Lesley: I mentioned to Jeff this morning that he might appreciate meeting Perry Lerner, CEO of Crown Global, regarding some life insurance ideas he has. Jeff suggested we try to meet next week when he is in NYC. Perry is available 9/22 and 9/24. I will tag along if I can, but I'm not essential to the meeting. I have cc'd my assistant, Kim. What times work best for Jeff?

Jeff: Perry thinks you met him 10 years ago on something unrelated.

Barry

Barry Cohen  
Apollo Management  
9 West 57th Street, 37th Floor  
New York, NY 10019  
W: [REDACTED]  
C: [REDACTED]

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