

From: Jeff Brodsky [REDACTED] >
To: "jeevacation@gmail.com" <jeevacation@gmail.com>
Subject: Follow-up
Sent: Friday, May 6, 2016 2:39:21 AM
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Jeff,

Nice talking with you yesterday. We're pulling together some sample reports which I expect to send to you next week. However, as we discussed, for our large family office clients there are no "standard reports". Rather, it often depends on the audience (i.e., CIO vs CEO vs family member) and the desired information. We'd welcome the opportunity to meet with you to discuss in more detail the goals and objectives for the desired reporting. That would provide the best opportunity for us to demonstrate our ability to provide the needed reporting. We're happy to come to your offices for such a meeting.

Best regards, Jeff



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