

Message

**From:** Walker, Christopher [REDACTED]  
**Sent:** 3/6/2019 9:01:04 PM  
**To:** 'Scott Borgerson' [REDACTED]; Lindsay J. Annello [REDACTED]  
**CC:** GMAX [REDACTED]; Casriel, Lyle [REDACTED]; Tomkiewicz, Jessica [REDACTED]; Ramdeen, Vijai [REDACTED]; Rivas, Elyanna [REDACTED]; Shkreli, Juliana [REDACTED]; Walker, Christopher [REDACTED]  
**Subject:** RE: Angara Trust / Montpelier Trust 1099s

Scott/Lindsay,

We have reviewed the requested accounts. Please see the details below.

- There were no 1099s issued for [REDACTED] and [REDACTED] for Angara Trust.
- There are no tax documents for the Montpelier Trust accounts at UBS for 2018.

Thank you!

Chris



Christopher J. Walker  
Registered Client Service Associate

UBS Financial Services Inc.  
Private Wealth Management

Phone: [REDACTED]

Fax: [REDACTED]

[www.ubs.com/privatewealthmanagement](http://www.ubs.com/privatewealthmanagement)

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**From:** Scott Borgerson [mailto:[REDACTED]]  
**Sent:** Wednesday, March 06, 2019 11:55 AM  
**To:** Casriel, Lyle  
**Cc:** Lindsay J. Annello; Tomkiewicz, Jessica; Ramdeen, Vijai; Rivas, Elyanna; Shkreli, Juliana; Walker, Christopher; GMAX  
**Subject:** [External] Re: Angara Trust / Montpelier Trust 1099s

Thanks Lyle and team. Scott

On Mar 5, 2019, at 15:09, [REDACTED] wrote:

Adding my team, we will come back to you to help you reconcile.

Lyle Casriel  
Senior Vice President – Investments  
Private Wealth Advisor | Portfolio Manager  
UBS Private Wealth Management

T [REDACTED]  
[REDACTED]

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**From:** Lindsay J. Anello [mailto:[REDACTED]]  
**Sent:** Tuesday, March 05, 2019 1:44 PM  
**To:** Casriel, Lyle  
**Cc:** Scott Borgerson  
**Subject:** [External] Angara Trust / Montpelier Trust 1099s

Hi Lyle,

We are in the process of gathering information for the tax filings for the Angara Trust and the Montpelier Trust. To date, we've received 1099s for the following accounts held in the Angara Trust:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

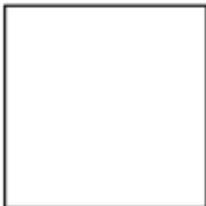
Were 1099s issued for the following accounts ending - [REDACTED] and - [REDACTED] which we had received in prior years?

Also, were any 1099s issued for the Montpelier Trust in 2018?

Thank you in advance for your assistance with this.

Best,  
Lindsay

LINDSAY J. ANNELLO, CPA, MSA  
Manager



DICICCO, GULMAN & COMPANY LLP

[REDACTED]  
[REDACTED]  
O: [REDACTED] F: [REDACTED]  
[REDACTED]



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