

From: Lesley Groff <[REDACTED]>
To: Epstein Jeffrey <[REDACTED]>
Subject: Fwd: NDA Alternative-Lou Kreisberg
Date: Tue, 12 Nov 2013 21:00:38 +0000

Please see below and advise how you wish me to answer...

Begin forwarded message:

From: "Louis Kreisberg" <[REDACTED]>
Subject: Re: NDA Alternative
Date: November 12, 2013 3:58:14 PM EST
To: "[REDACTED]" <[REDACTED]>
Reply-To: [REDACTED]

Do you know if Jeffrey plans on reaching out to Stanley or Jim?
Louis P. Kreisberg
Principal
Pioneer Wealth Partners, LLC
515 Madison Avenue, 13th Floor
New York, NY 10022

[REDACTED] tel
[REDACTED] fax
[REDACTED] cell

From: Lesley Groff <[REDACTED]>
Date: Fri, 1 Nov 2013 15:50:57 -0400
To: [REDACTED] <[REDACTED]>
Cc: Stanley Bergman <[REDACTED]>; James Brockway <[REDACTED]>
Subject: Re: NDA Alternative

Ok thanks

Sent from my iPhone

On Nov 1, 2013, at 3:43 PM, "Louis Kreisberg" <[REDACTED]> wrote:

Lesley, by mistake I failed to copy Jim and Stanley.
Louis P. Kreisberg
Principal
Pioneer Wealth Partners, LLC
515 Madison Avenue, 13th Floor
New York, NY 10022

[REDACTED] tel
[REDACTED] fax
[REDACTED] cell

From: [REDACTED] >
Date: Fri, 1 Nov 2013 15:38:53 -0400
To: Louis P. Kreisberg <[REDACTED]>
Subject: Re: NDA Alternative

Done!

Sent from my iPhone

On Nov 1, 2013, at 3:30 PM, "Louis P. Kreisberg" <[REDACTED]> wrote:

Lesley- Please pass this on to Jeffrey.

Jeff- I understand your policy of not signing NDAs. I was with Jim Brockway yesterday at Withers, and I shared with him the history of our communication. He suggested that given their experience and understanding of our structure and opinion letters, he and Stanley would be happy to speak with you about it. Although I'm not sure whether our product would be for you or your clients, I think we can both do extremely well working together. We've had tremendous traction with the large single family offices, and they believe there is nothing like it in the market. Pls fee free to speak with Stanley or Jim on our dime and see if you can figure out if we can create a win win.

Regards,
Lou

Louis P. Kreisberg
Principal
Pioneer Wealth Partners, LLC
515 Madison Avenue, 13th Floor
New York, NY 10022

[REDACTED] tel
[REDACTED] fax
[REDACTED] cell