

From: John Dizard <[REDACTED]>

To: Lesley Groff <[REDACTED]>

Subject: Fwd: Redacted past work product for investors

Date: Wed, 26 Oct 2016 21:50:45 +0000

Attachments: mime_part_1.pdf; mime_part_2.pdf;
Redacted_analysis_of_proposal_on_geothermal_project.pdf;
Redacted_Greek_Swiss_law_bond_memo.pdf; Redacted_natural_gas_VPP_memo.pdf;
Redacted_proposal_for_European_corporate_debt_exchange.pdf

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Dear Jeffrey,

I have looked for examples of my non-journalistic consulting work that could be sensibly and discreetly redacted, and which showed the difference between the level of detail of my work for private investors and my journalistic efforts. There is a review of a geothermal project I turned down, an overview of how the US natural gas market bubble was inflated, the effect on energy investors of a then-prospective court setback for the EPA, and a discussion of natural gas Volumetric Production Payments.

The passage of time should allow some measure of how well my views anticipated future events

This is energy weighted, but it should give you some idea of what I was proposing

Best and thanks!

John