From: Richard Kahn <[redacted]>
To: "jeffrey E." <jeevacation@gmail.com>
Subject: Re: Meeting with Michael Liebeskind
Date: Thu, 16 Jul 2015 12:42:27 +0000
Attachments: PPVA_Overview.pdf; Registered_Insurance-Dedicated_Funds.pdf; Non-Registered_Insurance-Dedicated_Fund_Offerings.pdf

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gentleman who i was referred to from Paul Morris regarding single premium and variable annuities

Begin forwarded message:

From: Michael Liebeskind <[redacted]>
Subject: Annuities
Date: June 19, 2015 at 11:35:06 AM EDT
To: Richard Kahn <[redacted]>

Rich,

Here is some preliminary information you can share with your client who is considering a deposit of $25 - $50 million into either an Immediate Annuity or a Private Placement Variable Deferred Annuity:

Immediate Annuity:
-- the monthly payout for a $25 million deposit, payable for the lifetime of a 62 year-old male, would be approximately $127,500.
-- the monthly payout for a $50 million deposit, payable for the lifetime of a 62 year-old male, would be approximately $255,000.
-- the monthly payout will be lower if you want to guarantee that the full $25 or $50 million deposit is reimbursed (either in a lump sum or over time) if the 62 year-old male dies prematurely.
-- we will want to conduct a pricing auction to assure the best possible monthly payout. The insurance companies are constantly changing their pricing factors, and a deposit of this size will require a multi-insurance company portfolio (which you would want anyway in order to diversify the credit risk).

Private Placement Variable Deferred Annuity:
-- here is a link to a brief video that explains the basics of a Private Placement Variable Deferred Annuity:
http://vimeo.com/wingedkeelgroup/ppvainvestmentaccounts
Password: PPVA2015
-- **PPVA Overview (attached):** This document is a simple one-page summary of a PPVA Investment Account. Under IRC Section 72, an investment account administered by an insurance company qualifies for deferral of investment gains from current period taxation. PPVA Investment Accounts should be considered when the client's objectives are: 1) deferral of income taxes on investment allocations to asset classes that would otherwise be highly tax-inefficient, and/or 2) optimization of the value that will ultimately be bequeathed to a private foundation or public charity.
-- **Registered Insurance-Dedicated Funds (attached):** Each of the major life insurance companies in the domestic PPVUL and PPVA Investment Account markets offer a substantial number of 1940 Act registered IDFs providing daily liquidity and covering a wide range of traditional asset classes. The attached lists summarize the registered IDFs available for allocation with John Hancock, Pacific Life, and Prudential (which offer PPVUL Investment Accounts only) along with Philadelphia Financial Group and Zurich (which offer both PPVUL and PPVA Investment Accounts).
-- **Non-Registered Insurance-Dedicated Funds (attached):** In addition to the registered IDFs, each of the major domestic life insurance companies in the PPVUL and PPVA Investment Account markets also offer a select group of non-registered IDFs, which have more restrictive liquidity terms and cover alternative asset classes. The attached lists summarize:

-- The IDFs currently available for allocation, and
-- The IDFs that are currently in development.

Michael

____

Michael Liebeskind
Winged Keel Group, Inc.
[redacted]
212-527-8098 (fax)
[redacted]
www.wingedkeel.com

Richard Kahn
HBRK Associates Inc.
[redacted]
tel [redacted]
fax [redacted]
cel [redacted]

On Jul 16, 2015, at 8:40 AM, jeffrey E. <jeevacation@gmail.com> wrote:

remin me who he is?

On Thu, Jul 16, 2015 at 8:37 AM, Richard Kahn <[redacted]> wrote:

> please advise if you would like this meeting on annuities next Tuesday at 11 or 11:30am
> thank you
>
> Richard Kahn
> HBRK Associates Inc.
> [redacted]
> tel [redacted]

fax [redacted]
cell [redacted]

Begin forwarded message:

From: Tiffany Valenzano <[redacted]>
Subject: RE: Meeting with Michael Liebeskind
Date: July 15, 2015 at 5:10:17 PM EDT
To: "[redacted]" <[redacted]>

Mr. Kahn,

I was able to rearrange Michael's calendar and while 11:30 would work better, he can meet at 11:00am if that were more convenient for your client.

Thanks.

From: Tiffany Valenzano
Sent: Wednesday, July 15, 2015 3:58 PM
To: 'Richard Kahn'
Subject: RE: Meeting with Michael Liebeskind

Understood. Can we pencil in 11:30 on the 21st? I have to see what I can rearrange on Michael's schedule before committing but we would really like to make this work.

From: Richard Kahn [mailto:[redacted]]
Sent: Wednesday, July 15, 2015 3:54 PM
To: Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

unfortunately my clients schedule is very full and he does all his meetings at his home

thank you

Richard Kahn
HBRK Associates Inc.
[redacted]
tel [redacted]
fax [redacted]
cell [redacted]

On Jul 15, 2015, at 3:50 PM, Tiffany Valenzano <[redacted]> wrote:

My apologies, unfortunately that does not seem possible. Michael has a meeting all the way downtown prior to the proposed meeting with you. Is there a possibility to meet at our office at 12:30pm? We will try to rearrange Michael's calendar. Please advise.

Thank you.

From: Richard Kahn [mailto:[redacted]]
Sent: Wednesday, July 15, 2015 3:17 PM
To: Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

meeting would have to be at our office if that works for michael

[redacted]

thanks

Richard Kahn
HBRK Associates Inc.
[redacted]
tel [redacted]
fax [redacted]
cel [redacted]

On Jul 15, 2015, at 2:14 PM, Tiffany Valenzano <[redacted]> wrote:

We would be happy to accommodate a meeting at our office on Tuesday, July 21st at 11:00am. Might that work? Other than that, Michael has little flexibility.

Thanks.

From: Richard Kahn [mailto:[redacted]]
Sent: Wednesday, July 15, 2015 1:52 PM
To: Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

my client is in town next week july 20-22 but then not back until early september

might michael have any time on any of those days?

thanks

Richard Kahn
HBRK Associates Inc.
[redacted]
tel [redacted]

On Jul 14, 2015, at 4:05 PM, Tiffany Valenzano <[redacted]> wrote:

Hello Mr. Kahn,

I am following up with you regarding the meeting we are trying to coordinate with your client. Please let me know if you would like me to send you some dates in the beginning of August for your consideration?

Thank you,

Tiffany

From: Tiffany Valenzano
Sent: Tuesday, July 07, 2015 12:59 PM
To: 'Richard Kahn'
Cc: Theresa Vanda
Subject: RE: Meeting with Michael Liebeskind

Will do. If anything changes, please let me know.

Tiffany

From: Richard Kahn [mailto:[redacted]]
Sent: Tuesday, July 07, 2015 12:52 PM
To: Tiffany Valenzano
Cc: Theresa Vanda
Subject: Re: Meeting with Michael Liebeskind

lets touch base next week as i am unaware of my clients schedule for end of month

thanks

Richard Kahn
HBRK Associates Inc.

[redacted]
tel [redacted]
fax [redacted]
cell [redacted]

On Jul 7, 2015, at 12:45 PM, Tiffany Valenzano <[redacted]> wrote:

Rich,

I am afraid not. Michael's schedule is quite hectic through July. Does your client have any availability in the afternoon on Thursday, July 23rd? Alternatively, Michael is fairly wide open on Tuesday, August 4th.

Tiffany

From: Richard Kahn [mailto:[redacted]]
Sent: Tuesday, July 07, 2015 12:39 PM
To: Tiffany Valenzano
Cc: Theresa Vanda
Subject: Re: Meeting with Michael Liebeskind

thursday 9am will not work

does michael have any availability on friday?

please advise

thanks

Richard Kahn
HBRK Associates Inc.
[redacted]

[redacted]
tel [redacted]
fax [redacted]
cell [redacted]

On Jul 7, 2015, at 9:51 AM, Tiffany Valenzano <[redacted]> wrote:

Hello Rich,

I hope you enjoyed the holiday weekend.

I am following up with you on the meeting we are trying to coordinate with Michael Liebeskind and your client. I apologize, but I've had to release the date we were holding this week. Please let me know if I may provide you some alternatives, or if you would like to provide me with your client's availability and we will do our best to accommodate.

Thank you,

Tiffany

From: Richard Kahn [mailto:[redacted]]
Sent: Wednesday, July 01, 2015 10:35 AM
To: Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

ok

thanks

Richard Kahn
HBRK Associates Inc.

[redacted]
tel [redacted]
fax [redacted]
cell [redacted]

On Jul 1, 2015, at 9:59 AM, Tiffany Valenzano <[redacted]> wrote:

Hi Rich,

I will continue to hold the time on July 9th. Let's plan to follow up Monday, July 6th. Enjoy the holiday weekend.

Thank you,

Tiffany

From: Richard Kahn [mailto:[redacted]]
Sent: Tuesday, June 30, 2015 4:34 PM
To: Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

Not yet sure of principals schedule for next week

July 7th definitely will not work but July 9th may

Please do not keep open for me and we will revisit dates when I know his schedule better

Thanks

From: Tiffany Valenzano <[redacted]>
Date: Tuesday, June 30, 2015 at 3:05 PM
To: Richard Kahn <[redacted]>
Subject: RE: Meeting with Michael Liebeskind

Hello Mr. Kahn,

I am following up to Kristen's e-mail below regarding scheduling a meeting with you and your client. Please let me know if either of the times we are holding will be convenient for you:

Tuesday, July 7th at 4:00pm or Thursday, July 9th at 9:00am

Thank you,

Tiffany

From: Kristen Shubilla
Sent: Friday, June 26, 2015 11:57 AM
To: [redacted]
Cc: Michael Liebeskind; Tiffany Valenzano
Subject: RE: Meeting with Michael Liebeskind

Hello Mr. Kahn,

Michael is available to meet on Tuesday, July 7th at 4:00pm or Thursday, July 9th at 9:00am. Please let me know if either of these times will work and I will send out a meeting invitation to confirm.

Thank you,

Kristen

From: Richard Kahn [mailto:[redacted]]
Sent: Friday, June 26, 2015 11:09 AM
To: Kristen Shubilla
Cc: Michael Liebeskind; Tiffany Valenzano
Subject: Re: Meeting with Michael Liebeskind

it appears that my client is very interesting in meeting however he will not be in NYC next week

please advise on your availability week of july 6th

thank you

Richard Kahn
HBRK Associates Inc.
[redacted]
tel [redacted]
fax [redacted]
cell [redacted]

On Jun 25, 2015, at 3:58 PM, Kristen Shubilla <[redacted]> wrote:

Dear Mr. Kahn,

Per your conversation with Michael Liebeskind this afternoon, I am writing to offer time for him to meet with you and your client next week. The options listed below assume that the meeting will be held in New York City. Please let me know if my assumption is correct or if the meeting might be out of town so I may plan accordingly:

Wednesday, July 1st at 11:00am or 12:00pm

Thursday, July 2nd at 11:30am or 4:30pm

I will hold the above dates and times until I hear from you. Please let me know if there is anything further I can do to assist with scheduling this meeting.

Thank you.

Kristen Shubilla

____

Kristen Shubilla

Assistant to Michael Liebeskind

Winged Keel Group, Inc.

[redacted]

[redacted](fax)

[redacted]

www.wingedkeel.com

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please note
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