

**From:** "jeffrey E." <jeevacation@gmail.com>  
**To:** Melanie Spinella <[REDACTED]>  
**Subject:** Fwd: Confidentiality Agreements  
**Date:** Tue, 06 May 2014 21:56:51 +0000

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slowly i turned step by step inch by inch

----- Forwarded message -----

**From:** **Ada Clapp** <[REDACTED]>  
**Date:** Tue, May 6, 2014 at 9:21 AM  
**Subject:** RE: Confidentiality Agreements  
**To:** "jeffrey E." <jeevacation@gmail.com>  
**Cc:** Eileen Alexanderson <[REDACTED]>

Hi Jeffrey,

Where shall I call you if you want to discuss? I tired your number and got voicemail.

I think it is important to have everyone involved in the family's planning sign confidentiality agreements. The earlier in the process the better as an agreement signed now would not necessarily protect against prior disclosures (unless the individual signing is willing to make a representation that they have not disclosed confidential information prior to the date of the document—or to have the document be effective as of an earlier date). However, an agreement signed now would protect against future disclosure of all information obtained by the signer—including information obtained prior to the date of the agreement.

Recall that I had five-year's worth of confidential information about Leon and his family at US Trust and still signed a confidentiality agreement when I started with the family office. I don't think the analysis is different for Darren, Rich and Larry. In fact, Darren appears to be working with information that is so confidential you are considering whether it can be shared with me (I am referring to the "gift trust" which Darren was drafting on his computer at our last meeting). He is clearly acquiring new confidential information daily and this needs to be protected.

I can revise the confidentiality agreements Paul Weiss prepared last July to update them and date them as of today if you prefer but it is my recommendation that everyone receiving any information about Leon and his family sign one.

Happy to discuss.

**Ada Clapp**

Elysium Management LLC

EFTA00989100

445 Park Avenue

Suite 1401

New York, New York 10022

Direct Dial: [646-589-0303](tel:646-589-0303)

Fax: [646-589-0330](tel:646-589-0330)

Email: [REDACTED]

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**From:** jeffrey E. [mailto:[jeevacation@gmail.com](mailto:jeevacation@gmail.com)]

**Sent:** Tuesday, May 06, 2014 2:40 AM

**To:** Ada Clapp

**Subject:**

Speak to me re confidentiality agreements at this late stage.

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