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**To:** Paul Barrett <[REDACTED]>, Richard Kahn <[REDACTED]>

**Subject:**

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paul, definite growing pains. . please provide me a total list of all transactions initiated by you since inception. dates cost. p and l realized and unrealized. . ticker symbol. . etc I think your thoughts on sectors is accurate. however its execution m bears littel resemblance. . ge being a sum of parts , is not a strategy. ? watching nespar go the other way and keeping the position. is not a stratgey. . e gaming , as a view is a good one, nintendo. ? probably not the best way to play it. owning google amazon facebook. . is a core positon . if i wanted to follow berkshire , its easy enough. netiher of these positions requires judgement . . analysis. views. expertise.

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please note

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