

From: Jeff Brodsky <[REDACTED]>

To: jeffrey E. <jeevacation@gmail.com>

Subject: RE: Follow-up

Date: Fri, 06 May 2016 15:25:13 +0000

Inline-Images: image001.gif

Jeff,

I just tried to reach you on your phone, but it did not go to voicemail so I couldn't leave a message. I spoke with my team this morning and we're in the process of pulling together some reports to send to you next week. The additional insight you shared on your second email this morning is helpful. If you'd still like to talk today please call me. Otherwise, I'll be back in touch next week.

Best regards, Jeff



Jeff Brodsky | Private Client Services

Ernst & Young LLP
155 N. Wacker Dr., Chicago, IL 60606
Office: [REDACTED] | Cell: [REDACTED] | [REDACTED]
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Marilyn Morriss | Phone: [REDACTED] | [REDACTED]

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

Sent: Friday, May 06, 2016 5:21 AM

To: Jeff Brodsky

Subject: Re: Follow-up

multi home reporting , perosnal ex art collection mgmt +2 billion. . toys boats planes heli etc. . cash flow reporting ? . multi entity ,4 children complex trust and estate reporting? calculation of taxes on death ? etc

On Thu, May 5, 2016 at 10:39 PM, Jeff Brodsky <[REDACTED]> wrote:
Jeff,

Nice talking with you yesterday. We're pulling together some sample reports which I expect to send to you next week. However, as we discussed, for our large family office clients there are no "standard reports". Rather, it often depends on the audience (i.e., CIO vs CEO vs family member) and the desired information. We'd welcome the opportunity to meet with you to discuss in more detail the goals and objectives for the desired reporting. That would provide the best opportunity for us to demonstrate our ability to provide the needed reporting. We're happy to come to your offices for such a meeting.

Best regards, Jeff



Jeff Brodsky | Private Client Services

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