

# Chuck Lovre

Eric Bodner  
Chad Taffee  
MGL

## Action Items:

Send PPA for charitable planning deck.

- Steve felon is super-busy
- GRAT when 7872 rate was 69 bps
- 100 mm / yr for next 10 yrs
- already has \$1 billion liquid at Goldman + Corrent.
- Asa trust 30 mm
- Daughter Nikki trust 30 mm + GRAT Remainder.
- Chad mentioned that Brady Knight is trying to build a relationship with Corrent.