

8/27

Chuck Lorré

Eric Bodner
Chad Tuffe.
mm

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 + Corient.
- Asa trust 30 mm
- Daughter Nikki trust 30 mm + GRAT Remainder.
- Chad mentioned that Brady Knight is trying to build a relationship with Corient.