

Date	Content	Sender	Participants
2022-04-04 12:17:09 (CDT)	👍	Mathias Döpfner	Mathias Döpfner, Self
2022-04-11 09:23:35 (CDT)	Great to hang yesterday. I'd love to help think through the structure for the Doge social media idea. Let me know how I can help	Kimbal Musk	Kimbal Musk, Self
2022-04-11 09:58:35 (CDT)	Ok	Self	Kimbal Musk, Self
2022-04-14 11:07:26 (CDT)	Loved "you are the hero Gotham needs - hell F'ing yes!"	Self	Marc Merrill (Riot), Self
2022-04-14 11:08:03 (CDT)	Liked "Amazing! Not sure which plan to root for. If Plan B wins, let me know if blockchain engineers would be helpful."	Self	Steve Davis, Self
2022-04-14 14:45:30 (CDT)	<Attachment - application/vnd.openxmlformats-officedocument.wordprocessingml.document - Twitter_Interview.docx>	Mathias Döpfner	Mathias Döpfner, Self
2022-04-15 16:51:45 (CDT)	Laughed at "Who knew a Saudi Arabian prince had so much leverage and so much to say about twitter."	Self	Omead Afshar, Self
2022-04-20 15:56:26 (CDT)	Hi Elon - it's Brian Kingston at Brookfield. There was an article today in the FT that said we (Brookfield) have "decided against providing an equity cheque" for a Twitter buyout. I just wanted to let you know that didn't come from us - we would never comment (on or off the record) about something like that, particularly when it relates to one of our partners. We appreciate all that we are doing on solar together and you allowing us to participate in the Boring Co raise this week. While I'm sure you don't believe anything you read in the FT anyway, I'm sorry if the article caused any aggravation. If there is anything we can do to be helpful, please do let me know.	Brian Kingston	Brian Kingston, Self
2022-04-23 19:57:05 (CDT)	Michael Grimes here so you have my number and know who is calling. Dialing you now	Michael Grimes	Michael Grimes, Self
2022-04-23 20:55:03 (CDT)	Liked "Michael Grimes here so you have my number and know who is calling. Dialing you now"	Self	Michael Grimes, Self
2022-04-23 22:05:29 (CDT)	https://youtu.be/D0W1v0kOELA	Michael Grimes	Michael Grimes, Self
2022-04-23 22:10:52 (CDT)	Laughed at " https://youtu.be/D0W1v0kOELA "	Self	Michael Grimes, Self
2022-04-24 16:32:08 (CDT)	If you have a second to chat	Michael Grimes	Michael Grimes, Self
2022-04-25 14:55:48 (CDT)	<Attachment - image/jpeg - Elon Musk and Twitter Reach Deal on Sale Live Up....jpeg>	Adeo Ressi	Adeo Ressi, Self
2022-04-25 14:55:48 (CDT)	Congrats? This will be a good thing.	Adeo Ressi	Adeo Ressi, Self
2022-04-25 14:57:36 (CDT)	I hope so :)	Self	Adeo Ressi, Self
2022-04-25 14:58:55 (CDT)	You've had ideas on how to fix that company for A LONG TIME. The time is now.	Adeo Ressi	Adeo Ressi, Self
2022-04-25 15:03:20 (CDT)	I think it's exciting.	Adeo Ressi	Adeo Ressi, Self
2022-04-25 15:31:14 (CDT)	Congrats! Super important to solve the bot problem.	James Musk	James Musk, Self
2022-04-25 18:40:45 (CDT)	Perfect.	Michael Grimes	Michael Grimes, Self
2022-04-25 19:58:02 (CDT)	got it. Will forward the equity interest email to Jared and Alex that he sent in and have it in the queue in the event his interest is needed overall. Absent the blockchain piece he's focused on investing if you want his interest in Twitter and your mission but we can park him for now.	Michael Grimes	Michael Grimes, Self
2022-04-25 20:04:43 (CDT)	Agree. Was one piece of equation and I do think he would be at least 3bn if you like him and want him, maybe more. Will work with Jared and Alex to be sure it makes sense to meet - my instinct is it does because Orlando Braco also declined today in the end (not sure if political fears or what but he flaked today).	Michael Grimes	Michael Grimes, Self
2022-04-25 21:42:35 (CDT)	Thanks	Self	James Musk, Self
2022-04-25 21:42:45 (CDT)	The bot problem is severe	Self	James Musk, Self
2022-04-27 19:51:21 (CDT)	This is Elon	Self	Reid Hoffman, Self
2022-05-01 15:17:24 (CDT)	Am at my Mom's apartment, doing Twitter diligence calls	Self	Sean Parker, Self
2022-05-02 11:32:48 (CDT)	https://twitter.com/elonmusk/status/1521158715193315328?s=10&t=ghtc_Qn6KY9B9C4vrtIFIQ	Jason Calacanis	Jason Calacanis, Self
2022-05-02 11:32:48 (CDT)	on thing you can do in this regard is an SPV of 250 folks capped at \$10m.. pain on the next for a large company, but one item on cap table	Jason Calacanis	Jason Calacanis, Self
2022-05-02 11:33:00 (CDT)	You do have to have someone lead/manage the SPV	Jason Calacanis	Jason Calacanis, Self
2022-05-02 11:34:53 (CDT)	Go ahead	Self	Jason Calacanis, Self
2022-05-02 11:42:30 (CDT)	Liked "Go ahead"	Jason Calacanis	Jason Calacanis, Self
2022-05-02 11:43:04 (CDT)	When you're private its fairly easy to do, but I think current shareholders have to re-up	Jason Calacanis	Jason Calacanis, Self

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2022-05-02 11:47:16 (CDT)	Are you sure?	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-02 11:51:13 (CDT)	I am not	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-02 11:51:21 (CDT)	Have never done a take private	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-02 11:52:09 (CDT)	Large shareholders (QPs) are likely different than non-accredited investors	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-04 04:06:20 (CDT)	No response from Bret, not even an interest in talking. I think it's probably best to release the debt tomorrow. This might take a while.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-05 10:45:04 (CDT)	Sorry, who is sending this message?	Self ([REDACTED])	Sam BF ([REDACTED])	Self ([REDACTED])
2022-05-05 11:34:06 (CDT)	In LA right now. SF tomorrow to due diligence on Twitter.	Self ([REDACTED])	James Murdoch ([REDACTED])	Self ([REDACTED])
2022-05-05 17:40:57 (CDT)	Sorry, I have to be at Twitter HQ tomorrow afternoon for due diligence.	Self ([REDACTED])	John Elkann ([REDACTED])	Self ([REDACTED])
2022-05-05 19:49:46 (CDT)	Nikesh came to see me this afternoon. Just to talk Twitter and you. If you had the time he would cancel his plans tomorrow night to meet with you and come to where you are in SF or mid peninsula. Or he could fly to Austin another time of course. If you want me to send him to you after the Twitter meeting let me know and he will break his plans to do	Michael Grimes ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-05 21:13:06 (CDT)	It's fine, no need to break his plans.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-05 21:14:42 (CDT)	Got it.	Michael Grimes ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-05 21:57:06 (CDT)	Liked "Best to be low-key during transaction"	David Sacks ([REDACTED])	David Sacks ([REDACTED])	Self ([REDACTED])
2022-05-08 16:31:48 (CDT)	I asked Pat and Kristina to each spend the weekend writing up their transition and diligence plan and how to approach debt rating agencies on May 16. We need one of them signed up (employment contract for 3 months) as Transition CFO of X Holdings and owning the model and diligence from financial point of view on the follow up meetings with Twitter on costs and users and engineers etc. We believe two will not work at the agencies or in front of debt investors as you have to have one CFO. If you were willing to have SVP Ops of X Holdings (Pat would be more qualified for that than Kristina) then it's possible to retain them both for the transition. The way to stay on ludicrous speed is to pick one of them tomorrow as transition CFO and then we run with it full metal jacket. I believe each can do the job and deliver the ratings and debt and transition plan for day one. Then you dismiss him/her as job well done or offer permanent CFO if you choose. You get the speed and certainty we need now but not locked into anything for future.	Michael Grimes ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:53:15 (CDT)	Neither were great	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:53:44 (CDT)	They asked no good questions and had no good comments	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:54:10 (CDT)	Let's slow down just a few days	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:54:33 (CDT)	Putin's speech tomorrow is extremely important	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:55:08 (CDT)	It won't make sense to buy Twitter if we're headed into WW3	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:55:14 (CDT)	Just sayin	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 17:58:57 (CDT)	Understood. If the pace stays rapid each are good enough to get job done for the debt. Then you hire great for go forward. But will pause for May 9 Vladimir and hope for the best there. We can take stock of where things look after that	Michael Grimes ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 18:10:09 (CDT)	Liked "Understood. If the pace stays rapid each are good enough to get job done for the debt. Then you hire great for go forward. But will pause for May 9 Vladimir and hope for the best there. We can take stock of where things look after that"	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 18:24:36 (CDT)	An extremely fundamental due diligence item is understanding exactly how Twitter confirms that 95% of their daily active users are both real people and not double-counted.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 18:24:56 (CDT)	They couldn't answer that on Friday, which is insane.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 18:27:33 (CDT)	If that number is more like 50% or lower, which is what I would guess based on my feed, then they have been fundamentally misrepresenting the value of Twitter to advertisers and investors.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 19:36:23 (CDT)	To be super clear, this deal moves forward if it passes due diligence, but obviously not if there are massive gaping issues.	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-08 19:37:04 (CDT)	True user account is a showstopper if actually much lower than the 95% claimed	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])
2022-05-09 05:52:43 (CDT)	Parag said that Twitter has 2500 coders doing at least 100 lines per month. Maybe they could fit this feature in ... https://twitter.com/skylerrainnj/status/1523616659365277698?s=10&t=1qmVNhjQPehaf8PEHifRQ	Self ([REDACTED])	Michael Grimes ([REDACTED])	Self ([REDACTED])

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2022-05-10 09:57:54 (CDT)	Connecting you.	Antonio Gracias ([REDACTED])	Antonio Gracias ([REDACTED])	Self ([REDACTED])
2022-05-10 10:22:51 (CDT)	Hi Elon This is Peter and my numbers. Look forward to being helpful Bob	[REDACTED]	[REDACTED]	Self ([REDACTED])
2022-05-10 10:23:02 (CDT)	Got it	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-05-10 10:23:26 (CDT)	Should we use the above two numbers for the conf call?	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-05-10 10:23:51 (CDT)	Sure	[REDACTED]	[REDACTED]	Self ([REDACTED])
2022-05-12 19:18:52 (CDT)	What's going on with you marketing an SPV to randos? This is not ok.	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:22:58 (CDT)	Not randos, I have the largest angel syndicate and that's how I invest. We've done 250+ deals like this and we know all the folks. I thought that was how folks were doing it.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:23:28 (CDT)	\$100m+ on commitments, but if that not ok it's fine. Just wanted to support the effort.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:25:46 (CDT)	~300 QPs and 200 accredited investors said they would do it. It's not an open process obviously, only folks already in our syndicate.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:28:30 (CDT)	There is *massive* demand to support your effort btw...people really want to see you win.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:30:30 (CDT)	Morgan Stanley and Jared think you are using our friendship not in a good way	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:31:12 (CDT)	This makes it seem like I'm desperate.	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:31:17 (CDT)	Please stop	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:31:48 (CDT)	Only ever want to support you.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:37:49 (CDT)	Clearly you're not desperate — you have the worlds greatest investors voting in support of a deal you already have covered. you're overfunded. will quietly cancel it... And to be clear, I'm not out actively soliciting folks. These are our exiting LPs not randos. Sorry for any trouble	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:55:14 (CDT)	Morgan Stanley and Jared are very upset	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:55:55 (CDT)	Ugh	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:58:44 (CDT)	SPVs are how everyone is doing there deals now... Luke loved to SPVs etc	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 19:59:13 (CDT)	Just trying to support you... obviously. I reached out to Jared and sort it out.	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 20:00:53 (CDT)	*moved	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 20:01:54 (CDT)	Yes, I had to ask him to stop.	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 20:06:45 (CDT)	Liked "Just trying to support you... obviously. I reached out to Jared and sort it out."	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 22:49:00 (CDT)	Cleaned it up with Jared	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 22:49:12 (CDT)	Liked "Cleaned it up with Jared"	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 22:49:58 (CDT)	I get where he is coming from.... Candidly, This deal has just captures the worlds imagination in an unimaginable way. It's bonkers...	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 22:51:42 (CDT)	And you know I'm ride or die brother — I'd jump on a grande for you	Jason Calacanis ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-05-12 22:51:49 (CDT)	Loved "And you know I'm ride or die brother — I'd jump on a grande for you"	Self ([REDACTED])	Jason Calacanis ([REDACTED])	Self ([REDACTED])
2022-06-16 22:04:25 (CDT)	If I understood them correctly, Ned and Parag said that cash expenditures over the next 12 months will be \$7B and that cash receipts will also be \$7B. However, the cash receipts number doesn't seem realistic, given that they expect only \$1.2B in Q2, which is just \$4.8B annualized.	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-06-17 03:30:59 (CDT)	In europe so just getting your msg. i do not have proxy w me but my guess is they are using their proxy numbers vs current reality. we are developing proformas that have lower revenue/receipts and lower disbursements.	[REDACTED]	[REDACTED]	Self ([REDACTED])
2022-06-17 09:32:38 (CDT)	Ok. Given that Q2 is almost over, it obviously doesn't make sense for them to use proxy numbers vs	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-06-17 10:10:31 (CDT)	I'm traveling in Europe right now, but back next week	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-06-17 12:47:17 (CDT)	i spoke w ned on the 7b receipts/expenses. he said he was trying to be more illustrative on '23 expense base, pre any actions we would take and provide a simplified strawman of possible savings. he said they are not planning on doing an updated fcst for 22/23. i think this is ok re process since i think their fcst would not likely be very good and we wouldn't likely use it anyways. They fly at way too high a level to have a fcst of much value. We are in process of developing revenue fcst and a range of sensitivities and will then walk thru w them to get their input.	[REDACTED]	[REDACTED]	Self ([REDACTED])
2022-06-17 13:39:34 (CDT)	Their revenue projections seem disconnected from reality	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])
2022-06-17 13:51:33 (CDT)	completely.	[REDACTED]	[REDACTED]	Self ([REDACTED])
2022-06-17 13:54:00 (CDT)	Phew, it's not just me	Self ([REDACTED])	[REDACTED]	Self ([REDACTED])