
From: Jeff Brodsky <[REDACTED]>
Sent: Wednesday, June 29, 2016 1:23 PM
To: jeffrey E.
Subject: FW: Family Office materials

Jeff, See below. As we discussed last week, Wendy reached out to Sharda, who responded to her inquiry and sent her some materials on our family office services (I'd planned to forward the email to you, which will follow). How should we proceed? Would it make sense for you and me to have a quick call?

--

Jeff Brodsky | Private Client Services

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Marilyn Morriss | [REDACTED] | [REDACTED] <mailto:marilyn.morriss@ey.com>

From: Wendy Dulman [REDACTED]
Sent: Wednesday, June 29, 2016 7:51 AM
To: Sharda Cherwoo
Cc: Jeff Brodsky
Subject: Re: Family Office materials

Hi. Thanks for the information. I forwarded it on to Brad Wechsler as well. Is your team available for a meeting on July 6th at our offices? Let me know. And thanks in advance.

Best. Wendy

Sent from my iPhone

On Jun 28, 2016, at 1:43 PM, Sharda Cherwoo <[REDACTED]> <mailto:sharda.cherwoo@ey.com> > wrote:

Dear Wendy,

As mentioned, attached are some materials relating to our family office services that may be helpful. We have a very strong practice in family office services and leaders with extensive experience and a great reputation.

I've copied Jeff Brodsky, who as mentioned in the prior note, has a very strong reputation in the family office advisor community. Jeff Brodsky and his team, including Bobby Stover, Alan Greenwell, Jon Carroll and Paul McKibbon, welcome the opportunity to talk to you and Brad and meet with you and others you suggest.

Please let me know which days would work for a quick call with Jeff and a meeting the week thereafter, if that works.

In the meantime, if you have any questions, please do not hesitate to call.

Warmly,

Sharda

<image001.gif>

<image002.gif>

Sharda Cherwoo | Partner

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<1003023_Family Office Guide_02Feb16_LR (3) (3).pdf>

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