

From: Anthony [REDACTED]
Sent: Tue, 11 Dec 2018 18:13:13 -0500 (EST)
To: E [REDACTED]
Cc: Paula [REDACTED] "Deanna [REDACTED] Jim [REDACTED]
Subject: Harbor Gate minimum exception request

Hi E [REDACTED]
Bob 'Smooth' McCullough and I did a call with a high-powered NY CPA yesterday. The CPA, [REDACTED] is excited about the program but, since we're so late in the year, would like to buy 1 unit as a guinea pig before recommending to his clients for next year? He also had one of his clients, [REDACTED] on the call who would like 2 units. [REDACTED] is very excited and half-jokingly says he can do \$100m next year with his clients and wonders why he is in the CPA business.
Can you please grant their wishes? We're jumping on our end to get docs and wires to you if approved.
Thanks, Anthony

P.s. [REDACTED] told me that 'Bob McCullough is smooth as silk!' I told Bob that he will be known as 'Smooth' from now on.

From: E [REDACTED]
Sent: Tuesday, December 4, 2018 5:02 PM
To: Anthony [REDACTED]
Cc: Paula [REDACTED] Deanna [REDACTED] Jim [REDACTED]
Subject: RE: New EcoVest conservation easement offering - Jay [REDACTED]

Anytime!

E [REDACTED]



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From: Anthony [REDACTED]
Sent: Tuesday, December 4, 2018 6:28 PM
To: E [REDACTED]
Cc: Paula [REDACTED] Deanna [REDACTED] Jim [REDACTED]
Subject: RE: New EcoVest conservation easement offering - Jay [REDACTED] needed

Much appreciated E [REDACTED]
Anthony

From: E [REDACTED]
Sent: Tuesday, December 4, 2018 4:27 PM
To: Anthony [REDACTED]
Cc: Paula [REDACTED]; Deanna [REDACTED] Jim [REDACTED]

[REDACTED]
Subject: RE: New EcoVest conservation easement offering - Jay [REDACTED] needed

Yes, we can make a note of it in the system.

Deanna, can you set up the [REDACTED] as well?

Thank you!

E [REDACTED]

E [REDACTED]



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[REDACTED]

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From: Anthony [REDACTED]

Sent: Tuesday, December 4, 2018 5:56 PM

To: E [REDACTED]

Cc: Paula [REDACTED]; Deanna [REDACTED]; Jim [REDACTED]

Subject: FW: New EcoVest conservation easement offering

Hi E [REDACTED]

I know it's not live yet, but per below, can you please let us know if we can buy 1 unit for this client once available as an exception to the minimum? He is a repeat customer.

Thanks, Anthony

[REDACTED]

From: [REDACTED] Jay [REDACTED]
Sent: Tuesday, December 4, 2018 2:10 PM
To: Anthony [REDACTED]
Cc: mark [REDACTED] Jim [REDACTED]
Subject: RE: New EcoVest conservation easement offering

That's correct. I will have to access some additional funds for this but fully expect to be ready to wire the funds for this one unit early next week.

From: Anthony [REDACTED]
Sent: Tuesday, December 04, 2018 2:55 PM
To: [REDACTED] Jay [REDACTED]
Cc: mark [REDACTED] Jim [REDACTED]
Subject: [EXTERNAL] - Re: New EcoVest conservation easement offering

Ok. To be clear, one share of Harbor Gate at \$21,485?

[REDACTED]

[REDACTED]

On Dec 4, 2018, at 1:52 PM, [REDACTED] Jay [REDACTED] wrote:

That will work better for me this year. I'd like to go ahead with 1 unit if that works. Please confirm.

From: Anthony [REDACTED]
Sent: Tuesday, December 04, 2018 12:53 PM
To: [REDACTED] Jay [REDACTED]
Cc: mark [REDACTED] Jim [REDACTED]
Subject: [EXTERNAL] - RE: New EcoVest conservation easement offering

Hi Jay,
I just got word that the unit price for the next EcoVest offering (Harbor Gate) is \$21,485. Let me know if that may work better for your needs.
Thanks, Anthony

From: Anthony [REDACTED]
Sent: Tuesday, December 4, 2018 10:22 AM
To: [REDACTED] Jay [REDACTED]
Cc: mark [REDACTED] Jim [REDACTED]
Subject: RE: New EcoVest conservation easement offering

No problem Jay,
The minimum is usually ~\$50k but we have been successful at requesting lesser amounts. They only do whole units/shares though. The current program unit price is \$18,922 so you may be able to do 1 or 2 units. There is one more program expected next week but I don't yet have a unit price for that one.
Let me know your thoughts.
Thanks, Anthony

From: [REDACTED] Jay [REDACTED]
Sent: Tuesday, December 4, 2018 10:17 AM
To: Anthony [REDACTED]

Cc: mark [REDACTED]; Jim [REDACTED]
Subject: RE: New EcoVest conservation easement offering

Sorry Anthony, I've been travelling a lot lately. I'm not in position to participate at the minimum level you mention below this year but are there any additional programs or options that would require a smaller investment amount?

From: Anthony [REDACTED]
Sent: Monday, December 03, 2018 10:15 AM
To: [REDACTED] Jay [REDACTED]
Cc: mark [REDACTED]; Jim [REDACTED]
Subject: [EXTERNAL] - RE: New EcoVest conservation easement offering

Hello Jay,
We're now down to the wire with EcoVest for the year. Are you interested for 2018?
Thanks, Anthony

From: Anthony [REDACTED]
Sent: Tuesday, October 23, 2018 8:47 PM
To: [REDACTED] Jay [REDACTED]
Cc: mark [REDACTED]; Jim [REDACTED]
Subject: New EcoVest conservation easement offering

Hi Jay,

Not sure how your AGI/ordinary taxable income is looking this year but thought I'd bring this to your attention since you participated last year. I've copied Mark here in case you're still working on year-end planning.

We just got approval for the next EcoVest program called Hammersmith Landing and I have attached the PPM for reference. The property is on the coast of Georgia and the program is approximately \$11m in size. The unit price is \$11,427 (5 unit minimum applies) and expected to sell out within a week or so. Still 4.1x charitable deduction for the conservation choice.

Please let me know if you are ready to invest and [REDACTED] can get the docs worked up for you. At this stage EcoVest will only confirm your investment once the application is received in good order along with the wired funds.

Touch base with any questions or let me know you'd like to do a call.

Thanks, Anthony