
From: Paul S Barrett [REDACTED]
Sent: Monday, December 6, 2010 5:57 PM
To: Epstein, Jeffrey (jeevacation@gmail.com)
Subject: A few things

Hi Jeffrey

Would like to catch up on the following ideas:

- Removing the Corn collar
- Buying \$3MM of a Philip Morris market plus note that pays a 15% coupon with a 22.30% contingent buffer (18 months)
- Buying 6 single name stocks that we believe will benefit from the January effect
- Switching our G= bond exposure into the convert

Left you a message.

Paul

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