

Message

From: Steele Schottenheimer [ss@haymancapital.com]
Sent: 7/14/2015 9:39:23 PM
To: Andy Jent [aj@haymancapital.com]; Brandon Osmon [bo@haymancapital.com]; Jeff Cate [jc@haymancapital.com]; Richard Howard [RichardHoward@haymancapital.com]; Tai-Li Chang [tlc@haymancapital.com]; Dan Babich [DB@haymancapital.com]; Parker Lewis [PL@haymancapital.com]; Davis Hostetter [dh@haymancapital.com]
CC: Katheryn E. Mueller [KM@haymancapital.com]; Lauren Schweiger Dillin [ld@haymancapital.com]
Subject: [REDACTED] meeting: Wed, July 22nd
Attachments: image001.png
Importance: High

Gentlemen,

We have a very important investment manger DD meeting with the [REDACTED] on Wed, July 22nd from 12:30PM-6:30PM and Thurs, July 23rd from 7:00- 9:00AM. They have requested the scheduling as follows:

July 22nd

- * 12:30-1:30PM- Andy Jent
- * 1:30-2:30PM- Brandon Osmon
- * 2:30-3:30PM- Richard Howard
- * 3:30-4:30PM- Jeff Cate
- * 4:30-6:30PM- 30 minutes with each of the analyst separately (TC, DB, PL and DH)

July 23rd

- * 7:00-9:00AM- Kyle

A couple of things to note:

1. I will be joining each of the members of the investment team for their session
2. This will be a very thorough meeting, so please be prepared. Let me know by the end of the week if you would like to reference specific handouts. I will have the following materials printed and available:
 - * [REDACTED]
 - * [REDACTED]
 - * [REDACTED] (SB and KM- KB wants this refined further)
 - * **UDF presentation**
 - * [REDACTED]
 - * [REDACTED]
3. The sessions with the new members of the team will be more introductory: background, role at Hayman, what you are working on, etc
4. The balance of the team will most likely be asked about P&L results of recent themes each of you cover. **Please refer to the below schedule Harvard has requested and accounting is working on.** I hope to get you the numbers to review by Monday.

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Let me know if you have any questions or think we should circle up this week. There is a prep meeting schedule with Kyle at 10:45AM on Wed, July 22nd.

Regards,

Steele Schottenheimer
Managing Director- Investor Relations
Hayman Capital Management, L.P.
2101 Cedar Springs Road, Suite 1400
Dallas, TX 75201
Direct: 214.347.8045
Fax: 214.347.8051
Email: ss@haymancapital.com<mailto:ss@haymancapital.com>