

Message

From: Parker Lewis [PL@haymancapital.com]
Sent: 2/3/2016 2:12:14 PM
To: @Edelman Hayman Capital Team [EdelmanHaymanCapital@edelman.com]
CC: Chris Kirkpatrick [CK@haymancapital.com]; Steele Schottenheimer [ss@haymancapital.com]; Katheryn E. Mueller [KM@haymancapital.com]; Juneau Lee [JL@haymancapital.com]
Subject: KB - CNBC Update
Attachments: image001.jpg

I just spoke with Kyle, he is going on CNBC at 10:15 EST. Faber wants to focus on China, so while there is a chance he asks a question about UDF, it is our expectation that he will not. Kyle and I agreed that it would then NOT make sense to do a media blitz later in the day today if UDF does not come up (i.e. go on CNBC and no mention of it in morning and then breaking later in day doesn't make sense). As a result, we think it makes sense to at least wait a day for the media push, but possibly push as far as Monday to allow today/this week to be about China and not confuse/conflate the two.

Kyle does want us to share the website with Brad Thomas (Forbes) in advance and also begin publicizing to our contacts in Dallas. Given we shared it with our investors (I know, in the meeting, one of the investors was emailing to friends/contacts in Dallas) and given kyle's desire to share with our contacts in Dallas in advance of a media blitz later this week/early next, this could leak to a blog at any time. When and if it breaks, we should be prepared to begin the media blitz and digital campaign.

[cid:image001.jpg@01C84251.44A3D170]

Parker Lewis
Hayman Capital Management, L.P.
2101 Cedar Springs Road Suite 1400
Dallas, TX 75201

214.347.8043 Direct
512.699.7480 Mobile
PL@HaymanCapital.com<mailto:PL@HaymanCapital.com>