

Message

From: Creighton, Lorne [LCreighton@catcapital.com]
Sent: 5/10/2014 8:44:34 AM
To: Moyse, Brandon [BMoyse@catcapital.com]
Subject: Re: Introduction to Wind Management 5 9 2014 - Notes v2

On my way into the office now.

From: Moyse, Brandon
Sent: Saturday, May 10, 2014 7:02 AM
To: Creighton, Lorne
Subject: Re: Introduction to Wind Management 5 9 2014 - Notes v2

Sorry, fell asleep early last night but I'm heading into the office soon and will get started on charts and tables.

Sent from my BlackBerry 10 smartphone on the Rogers network.

From: Creighton, Lorne
Sent: Saturday, May 10, 2014 12:53 AM
To: Moyse, Brandon
Subject: RE: Introduction to Wind Management 5 9 2014 - Notes v2

Hey so I started to put it together into a memo format. Obviously needs work still though, so I will clean up tomorrow morning, and add material from the excel/presentation as well.

From: Creighton, Lorne
Sent: May-09-14 11:57 PM
To: Moyse, Brandon
Subject: FW: Introduction to Wind Management 5 9 2014 - Notes v2

Ok so I guess he wanted an investment memo. Can you go through and add whatever you think is missing, since he seems to suggest I missed quite a few things from the meeting today? I will put together more of a memo format.

From: Michaud, Zach
Sent: May-09-14 11:43 PM
To: Creighton, Lorne; Moyse, Brandon
Subject: Introduction to Wind Management 5 9 2014 - Notes v2

Guys, please see my comments. We have quite a few things missing from the presentation and overall what was said at the meeting combined. Please take a look. Remember we have pretty good information to start a memo (you can take financial info from presentation and excel provided). The point is to summarize the comments at the meeting, the company materials and list specific areas we need to develop so we can do a full investment memo once we have completed due diligence. You want to write it as if you are writing an investment memo and presenting the investment thesis, understand there are holes but would rather fill those in with placeholders and questions.

Please revamp around this format/suggestions.

Let me know if you have any questions, it isn't clear or give me a call.

Thanks,

Zach

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