



Cindy Laquidara

Akerman LLP
50 North Laura Street
Suite 3100
Jacksonville, FL 32202-3646

T: 904 798 3700
F: 904 798 3730

May 29, 2020

VIA EMAIL

Christopher M. Garrett (garrettc@coj.net)
Assistant General Counsel
City Hall, St. James Building
117 West Duval Street, Suite 480
Jacksonville, Florida 32202

Re: Attached Subpoena; Delivery of Documents Responsive to Category 3 on behalf of Morgan Stanley & Co. LLC

Dear Chris:

I represent Morgan Stanley & Co LLC and write in response to the above referenced subpoena (“Subpoena”). Below please find the link to the documents, Bates-stamped numbered MS_JEA-00000000 to MS_JEA-00001333, that are being provided in response to Request Number (3) below and due today by agreement. We have also performed a search at what we understand was the request of City Council's outside legal counsel, Smith Hulsey and Busey for external documents using the following terms: “long-term investment plan,” “long term investment plan,” and “LTI,” although those terms are not within the terminology of this subpoena. We are continuing our review of those documents, although a number of them are captured in the PUP documents we are providing. Please note that all searches were conducted using specific search terms, custodians and date ranges.

For your convenience, we have included a copy of the Subpoena served on Morgan Stanley & Co. LLC, in which you seek the following three categories of documents:

- (1) All emails to or from any of your employees dated January 1, 2018 to or from JEA employees or board members of Lynne Rhode.
- (2) All documents of any sort, including but not limited to emails and text messages, concerning a success fee to the JEA ITN.
- (3) All documents of any sort pertaining to JEA's Performance Unit Plan proposed in 2019.

[\[Click to Retrieve File\(s\)\]](#)

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As for the first and second categories in the Subpoena, you granted my client an extension to respond until June 15, 2020,

Finally, the Firm knows of some limited technical issues regarding the archives and searches conducted on the archives that may affect the results of such searches. Should you need more information about the capabilities – and limitations – of the archives, please contact me at your convenience.

Please do not hesitate to contact me should you have any questions.

Sincerely,



Cindy A. Laquidara
Partner

cc: Matthew Morningstar (MATTHEW.Morningstar@morganstanley.com)
Jacqueline Arango (jacqueline.arango@akerman.com)