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Jordan Weiner & Terri P. Tepper
Barrington, IL 60010
jordan@internetconsultinginc.com &
[redacted]
281 961 4002

April 12th, 2024

Patrick Wade
Oppenheimer Compliance Department
85 Broad Street
New York, NY, 10004

Dear Mr. Wade,

At her request, I am writing this letter on behalf of my mother, Terri P Tepper (wife and beneficiary), to address the concerning financial issues regarding the Oppenheimer account of my late father, Lawrence Jay Weiner, managed by Jerry Hymen.

Over the past 5+ years, Oppenheimer was entrusted with managing my father's financial affairs during his battle with cancer, Parkinson's disease, and associated cognitive decline. My father chose Oppenheimer based on its commitment to customer asset protection and growth.

However, it has come to our attention that my Dad's Oppenheimer account, while under the management of Jerry Hymen, has the appearance of unethical and potentially illegal fee increases. There was a significant increase in Oppenheimer Wealth Management fees from 1.25% to approximately 2% starting in 2021. Unfortunately, while fees increased, the average annual return to my Dad's portfolio averaged 8% compared to the S&P average annual return of 13.3% from 2021 to 2023. Also, on the main account [redacted] starting in Jan 2021 there were three Jan, Feb, and March quarterly management fees totaling $12,427.32 in this quarter alone.

In addition to the fee increase, there were commissions charged for buying and selling assets totaling $7,629, contrary to our understanding that such fees were included in the wealth management fees. Jerry Hymen failed to disclose these changes in fees despite numerous conversations with me.

The exploitation of Dad's Oppenheimer account, particularly in light of his medical conditions, constitutes a serious breach of trust and fiduciary responsibility. It is evident that Mr. Hymen's actions do not align with your stated commitment to placing the interests of your clients first, as outlined in your Code of Ethics.

We request reimbursement of the excess fees taken when my father was not at his full mental capacity which total $46,304 from 2021-2023 along with the $7,629 commissions which brings

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the grand total to $53,033. We are open to amicable discussions to resolve these matters, avoiding the need for legal action or further escalation.

You can call me directly at 281-961-4002 to resolve these issues and alleviate the emotional distress caused by this situation.

Thank you for your attention to this matter.

Sincerely,

Jordan Weiner
Owner
Internet Consulting, Inc.
Email: Jordan@internetconsultinginc.com
Phone: 281-961-4002

Cc: Courtney Mygatt