
From: Caroline Kitidis [REDACTED]
Sent: 12/16/2013 11:23:35 AM
To: Joshua Shoshan [REDACTED]
CC: Chip Packard [REDACTED]; Donald Summer [REDACTED]; Haig Ariyan [REDACTED]; [REDACTED]; Michael laquinta [REDACTED]; Zbynek Kozelsky [REDACTED]
Subject: Re: ECM carve out to KCP client [C]

Classification: Confidential

Thanks Josh.

Yes, Epstein is one of our first focus KCP Cap market accounts. This is the account that Paul Morris and Tazia have worked on, bringing 200mm of assets over from JPM. He has started trading with us already, and we have him targeted to be a Tier 1 KCP client for 2014.

As such, I think it makes sense to think about his allocation from a KCP target bucket as you propose below.

Haig and Chip, we discussed this a month ago, having for both PCS and PB, KCP clients that we allocate a % of the allocation. In this specific KCP case, which won't be for all clients, the client is focused on syndicate and wants to be a part of our program.

Kind regards,

Caroline Kitidis



Caroline V. Kitidis

Managing Director | Head of Key Client Partners & Wealth Investment Coverage - Americas

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Passion to Perform

▽ Joshua Shoshan---12/16/2013 10:49:45 AM---Classification: Confidential Greetings, Caroline, Chip, Haig. Tazia and I discussed this case this morning. The proposal from

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