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From: Emily Craig
Sent: Wednesday, April 26, 2017 3:29 PM
To: Patrick Harris <[REDACTED]>; Daphne Cales <[REDACTED]>; Rodrigo Quintero <[REDACTED]>
Subject: RE: KYC HR Sync Up - Resources and Mercury [I]

Classification: **For internal use only**

Thank you for your time today!

I captured the following actions:

- 1) Emily to work with Zia on need for any resources for KYC SME team.
- 2) Pat to reach out to Armen on resource ideas for 2 additional consultants to add to Daphne's KYC Center
- 3) Emily to work with Eric on RTB resource needs if add KYC Periodic/EDR to scope of COG
- 4) Emily to reach out to Sheffali on status of small accounts
- 5) Rodrigo to work on in scope client list, highlighting CRP exit clients, small accounts based on band, work with Daphne based on her tracker.
- 6) Daphne to send Tracker to Rodrigo COB every Thursday, Rodrigo to provide updated full tracker to Pat and Emily every Monday by 9am.

Kind regards,
Emily Craig

<< OLE Object: Picture (Device Independent Bitmap) >>

Emily Craig
Director | Head - Wealth Management Americas Execution

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-----Original Appointment-----

From: Emily Craig
Sent: Wednesday, April 19, 2017 11:16 AM
To: Emily Craig; Patrick Harris; Daphne Cales; Rodrigo Quintero
Subject: KYC HR Sync Up - Resources and Mercury
When: Wednesday, April 26, 2017 11:30 AM-12:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: 1-877-329-6902; 18953429