
From: Jay Lipman [REDACTED]
Sent: 9/9/2013 4:03:46 PM
To: Amanda Kirby [REDACTED]
CC: Tazia Smith [REDACTED]; Vahe Stepanian [REDACTED]
Subject: Re: ACATS for Southern Financial/Trust [I]
Attachments: AWM Acct. Agreement.pdf; Corporate Account Authorization.pdf; New Corporate Info Sheet 6.2012.pdf; pic19640.gif; pic21742.gif; pic18060.gif; pic07900.gif

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Hi Amanda,

As we discussed earlier, the ACAT's will be more complicated than usual due to the exotic nature of some of the assets in the accounts.

As for Jeepers, please find attached below the necessary brokerage documents for a corporate account. Please find Completion Instructions:
Account Agreement - Please complete highlighted areas on pgs. 1, 6, 7, 14, and 15
Corp Acct. Authorization - Please complete highlighted area and sign/date bottom of pages 1 + 2

(See attached file: AWM Acct. Agreement.pdf)(See attached file: Corporate Account Authorization.pdf)(See attached file: New Corporate Info Sheet 6.2012.pdf)

Kind Regards,

Jay Lipman

(Embedded image moved to file: pic19640.gif)

Jay Lipman
Analyst I Markets Coverage Group

Deutsche Bank Securities Inc
Deutsche Asset & Wealth Management
345 Park Avenue - 26th Floor
New York, NY 10154

[REDACTED]

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From: [REDACTED]
To: [REDACTED]
Cc: [REDACTED]
Date: 09/09/2013 10:59 AM
Subject: ACATS for Southern Financial/Trust [I]

Classification: For internal use only

Hi Jay,

Wanted to touch base in regards to the ACATS for Southern Trust and Southern