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**From:** Bella Klein [mailto:[REDACTED]]  
**Sent:** Friday, February 02, 2018 12:49 PM  
**To:** Cynthia Rodriguez <[REDACTED]>  
**Subject:** Re: 2017 Caterpillar Trust - JE As Grantor to DW and LG as Trustees of The 2017 Caterpillar Trust January 3 2017  
I believe that you have all documents, please confirm when account will be opened.  
Thank you,  
Bella

[REDACTED]

On Feb 2, 2018, at 11:52 AM, Cynthia Rodriguez [REDACTED] wrote:

Hi Bella,

We will need the following information:

2017 Caterpillar Trust:

- Tax ID
- Address
- Date of Incorporation
- Trust Agreement

For Grantor/Trustee/Beneficiaries:

- Name
- Address
- Date of Birth
- Social Security Number
- Employment Information (name of employer, address etc)
- Photo ID

Please confirm which account will fund this new trust. Feel free to reach out if you have any questions. Thanks!  
Kind regards,

Cynthia Rodriguez

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