
From: Vahe Stepanian [REDACTED]
Sent: 1/25/2017 12:25:28 PM
To: Stewart Oldfield [REDACTED]
CC: Cynthia Rodriguez [REDACTED]
Subject: RE: Epstein/Southern Financial

Cool. Tazia and I had a sit-down with Artie Tremblay last week to get a bit more up to speed on our deposits offering – I mentioned to him that there may be an opportunity here.

Best,
Vahe

From: Stewart Oldfield
Sent: Wednesday, January 25, 2017 12:20 PM
To: Vahe Stepanian
Cc: Cynthia Rodriguez
Subject: RE: Epstein/Southern Financial

It did not. Will be part of a larger account review we do with him. It's on my list. Thanks for following up

From: Vahe Stepanian
Sent: Friday, January 20, 2017 3:31 PM
To: Stewart Oldfield
Subject: FW: Epstein/Southern Financial

Stew – did this ever happen? Probably worth revisiting.

Have a great weekend.

Best,
Vahe

From: Stewart Oldfield
Sent: Thursday, January 05, 2017 12:36 PM
To: Charlie Burrows
Cc: Bradley Gillin; Cynthia Rodriguez; Vahe Stepanian
Subject: Epstein/Southern Financial

Let's discuss what to show these guys to get them to move cash to the most efficient place for them and us

Thanks

From: Cynthia Rodriguez
Sent: Thursday, January 05, 2017 12:19 PM
To: Stewart Oldfield
Subject: RE: can you tell me what interest rate we are paying on JE's accounts? [I]

Attached is the spreadsheet of all accounts including account type, current (cash only) balances as of today, and interest rates. I've added a column for notes to distinguish the cash within the brokerage accounts. Let me know if you need anything else 😊