
From: Xavier Avila [REDACTED]
Sent: 7/7/2017 10:05:26 AM
To: Daniel-E Kaiser [REDACTED] Stewart Oldfield [REDACTED] Todd Stevens
CC: Tracy-Ann Hopkins [REDACTED]
Subject: RE: Epstein/Southern Financial reboot [1]

Classification: **For internal use only**

Happy to, I am around on Monday...

From: Daniel-E Kaiser
Sent: Friday, July 07, 2017 9:35 AM
To: Stewart Oldfield; Todd Stevens
Cc: Xavier Avila; Tracy-Ann Hopkins
Subject: RE: Epstein/Southern Financial reboot

I would suggest the week of July 24th. Could you, me and Xavier meet on Monday to strategize?

-----Original Message-----

From: Stewart Oldfield
Sent: Thursday, July 06, 2017 03:17 PM Eastern Standard Time
To: Todd Stevens; Daniel-E Kaiser
Subject: Epstein/Southern Financial reboot

Jeffrey's new trader will be available to meet with us after July 14th, when he wraps up his current job (I think he's coming from JPM or GS, but don't know that for sure). He will have POA over JE's trading accounts and it sounds as if he plans to trade in good size and frequency. I expect he will trade for other clients over time as well.

We've all agreed to use this as an opportunity to reboot our relationship and explore how we can do more business together. We know they are interested in flow equity and debt, preferreds and new issue across the spectrum. We should also be prepared to discuss what it would take for us to entertain opening a new OTC relationship.

As a reminder, JE keeps over \$100mm of deposits with us and does advisory work with Leon Black's family office. So I'd like to approach this as enthusiastically as we can.

Please let me know your availability July 17-19 and 24-27. We can meet at the DB offices or across the street with Rich Kahn.

Thanks



Stewart Oldfield, CFA, CAIA
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