

For only the JEE personal account – the POA should be completed, and we suggest checking off as “limited” power of attorney if only granting trading authority (vs. full POA, which would allow him to also transfer assets out of the account). Both forms have sections for name, legal address, DOB, and SSN. Our compliance mandates that the forms should be completed using your new hire’s personal address on the forms (i.e. not his office address). In addition, we will need a government issued (non-expired) photo ID.

I’m CC’ing my colleague Liam here who will help on the documentation side. Please let us know if you have questions.

Have a great weekend.

Best,
Vahe

From: Stewart Oldfield
Sent: Friday, August 25, 2017 11:18 AM
To: Richard Kahn [REDACTED]
Cc: Vahe Stepanian [REDACTED]
Subject: RE: trading meeting

Vahe - Can you help Rich with those docs?

Rich – will look at week of the 18th and be back

Thanks

From: Richard Kahn [mailto:[REDACTED]]
Sent: Friday, August 25, 2017 11:07 AM
To: Stewart Oldfield [REDACTED]
Subject: Re: trading meeting

i just found out that our new hire will be out that week...drama continues...
can we target the week of september 18th?

also can you send us trading authority docs on all brokerage accounts so that we
can add our new hire
thank you

On Aug 25, 2017, at 10:34 AM, Stewart Oldfield
[REDACTED] wrote:

Any luck with 9/14 or 9/15? Thanks

From: Stewart Oldfield
Sent: Tuesday, August 22, 2017 5:24 PM
To: 'Richard Kahn' [REDACTED]
Subject: RE: trading meeting