

**Cc:** Donald Summer; Vahe Stepanian; Todd Stevens; Tazia Smith; Joseph Dursi; Zbynek Kozelsky; Matthew Anderson  
**Subject:** J. Epstein & related accounts - your attention is needed [I]  
**Importance:** High

Classification: **For internal use only**

This is to follow up on a number of conversation we have regarding this client and his accounts.

This is the plan:

- 1) As of today Joshua Shoshan (CA ENJ) will take over coverage of these accounts and these accounts will reflect his CA number,
- 2) Daniel Sabba will no longer cover this client,
- 3) Josh's back-up coverage will be either Vahe Stepanian (primary) or Donald Summer (secondary),
- 4) Other WIC team members are not covering this client,
- 5) As of now this is a temporary arrangement until 1Q17 when other coverage changes may take place.

Do we all agree?

Thank you

Ziggy



**Zbynek "Ziggy" Kozelsky**  
Director | Branch Administrative Manager

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