

M. Case Comments		
Created By	Date	Comments
Cynthia Rodriguez	2/2/117 9:55 AM	Email confirmation from Jason Shames is attached.
Cynthia Rodriguez	12/30/116 11:29 AM	During the lifetime of the grantor, the trustees have the right to add/delete beneficiaries under Article Third of the Trust agreement by an acknowledged instrument delivered to the Grantor. Attached is the acknowledged instrument for the addition and deletion of the beneficiaries, signed by the trustees and the grantor.
Cynthia Rodriguez	2/1/117 11:23 AM	Amended list of beneficiaries attached to include [REDACTED]. Research is also attached.
Cynthia Rodriguez	1/30/117 2:45 PM	Jason Shames advised on 1/03/2017 that fully executed addition of beneficiary forms by the trustee, along with acknowledgment signature from the grantor are what is needed to make changes to the beneficiaries of the trust.
Cynthia Rodriguez	12/19/116 5:02 PM	Attached are the supporting documents for the addition/deletion of benes of this trust.

ONSHORE APPROVALS			
Client Facing Professional (CFP):	terri sohrab	(Signature) terri sohrab	12/15/2016
Office Director/Business Head:	Armen Brash	(Signature) Armen Brash	12/15/2016
Regional Office Director:		(Signature)	
AML Business Risk:		(Signature)	
AML Compliance:	Ricardo Mendoza	(Signature) Ricardo Mendoza	2/2/2017
	Yoonsun Chung	Yoonsun Chung	2/2/2017

LATAM/INTERNATIONAL APPROVALS			
Client Facing Professional (CFP):		(Signature)	
Account Manager:		(Signature)	
Global Market Team Head (GMTH)/Sub-Market Team Head (SMTH):		(Signature)	
AML Business Risk:		(Signature)	
AML Compliance:		(Signature)	

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