

From: Jj Litchford [REDACTED]
Sent: 10/19/2015 11:18:25 AM
To: Stewart Oldfield [REDACTED]
Subject: RE: Pipeline/ Top 25s [I]
Attachments: Pipeline and Top 25s.xlsx

Classification: **For internal use only**

Under Getz is:

<u>Getz, Bert A.</u>	Prospect	[REDACTED]	Stewart Oldfield
<u>Getz, George F.</u>	Prospect	[REDACTED]	Stewart Oldfield
<u>Getz, Jr. Bert A.</u>	Prospect	[REDACTED]	Stewart Oldfield
<u>Getz, Lynn M.</u>	Prospect	[REDACTED]	Stewart Oldfield
<u>Globe Investment Company, LP</u>	Prospect	Scottsdale	AZ Stewart Oldfield
<u>Olsen, Michael J.</u>			

Shamrock: email Armen (Julie is on MTA but I would cc her as well) and tell her you would like to claim Shamrock (indicating they are listed under Cheryl Paller and currently inactive with last contact in 2007).

Clients added in the attached version.



JJ Litchford
Associate Banker

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Passion to Perform

From: Stewart Oldfield
Sent: Monday, October 19, 2015 10:58 AM
To: Jj Litchford
Subject: RE: Pipeline/ Top 25s [I]

Classification: **For internal use only**

Who is under the Getz relationship?

And how did we get Shamrock into here?

Can you also add a client list into this? Would be good to track who we have accounts with already