
From: Stewart Oldfield [REDACTED]
Sent: 11/3/2017 10:09:34 AM
To: Bradley Gillin [REDACTED]
CC: Cynthia Rodriguez [REDACTED]
Subject: FW: historical GMIS/banker scorecard data
Attachments: Oldfield-Morris Revenues 2014-2016.xlsx

Fyi. Let's compare to this year at some point

From: Leslie Roth
Sent: Thursday, November 02, 2017 10:08 PM
To: Stewart Oldfield [REDACTED]
Cc: Donna Kerrigan <[REDACTED]>
Subject: RE: historical GMIS/banker scorecard data

Hi Stewart,

Here is a file which I retrieved from GMIS for the period 2014-2016. I pulled all client accounts which were assigned to either you or Paul Morris. The only team information available at that time has you assigned as the team.

Please review and let me know if it's what you are expecting.

Best Regards,

Leslie

From: Stewart Oldfield
Sent: Thursday, 2 November, 2017 5:41 PM
To: Leslie Roth
Cc: Donna Kerrigan
Subject: historical GMIS/banker scorecard data

Leslie,

I'm trying to compile my GMIS revenue data going back to 2014. I was teamed up with Paul Morris for much of that time, so some of the older revenues are likely listed as a team while more recently it would be individual. Is this something you can send me? Thanks

By year, here's how I think the data may be broken out:

2014 – Paul Morris individual and Morris/Oldfield joint
2015 – Morris/Oldfield joint
2016 – Morris/Oldfield joint and Oldfield individual
2017 – Oldfield individual (I have this data already)



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