

On Feb 28, 2019, at 3:40 PM, Stewart Oldfield <[REDACTED]> wrote:

Thank you again for your efforts during this process. I understand that arrangements have made for the full transfer of any remaining brokerage assets and that will be complete shortly. You have also been able to move and close several bank deposit accounts. We appreciate that despite this strong progress, you need some more time to complete the transfer of remaining assets to other institutions. Please attempt to have that wrapped up by March 29th if possible. If there is anything we can do to help expedite this, please let us know.

Thanks,

Stew

From: Stewart Oldfield
Sent: Friday, December 21, 2018 1:06 PM
To: [REDACTED]; [REDACTED]; Richard Kahn <[REDACTED]>
Subject: DB relationship transition letter

Jeffrey, Darren and Rich,

Please see the attached letter to confirm the substance of our recent conversations. Thank you for your cooperation.

Best,

Stew

<image001.png>

Stewart Oldfield, CFA, CAIA
Director

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