

Subject: Re: Epstein/Southern Financial reboot [I]
From: Stewart Oldfield <[REDACTED]>
Date: Mon, 10 Jul 2017 19:29:18 -0400
To: Vahe Stepanian <[REDACTED]>

Classification: For Internal Use Only

Yes. Internal mtg tmw. Client mtg in two weeks.

Stewart Oldfield, CFA, CAIA
Director

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From: Vahe Stepanian
Sent: Monday, July 10, 2017 06:00 PM
To: Stewart Oldfield
Subject: FW: Epstein/Southern Financial reboot [I]

Classification: For internal use only

Did you get a response on this?

From: Stewart Oldfield
Sent: Thursday, July 06, 2017 3:18 PM
To: Todd Stevens [REDACTED]; Daniel-E Kaiser <Daniel-[REDACTED]>
Subject: Epstein/Southern Financial reboot

Jeffrey's new trader will be available to meet with us after July 14th, when he wraps up his current job (I think he's coming from JPM or GS, but don't know that for sure). He will have POA over JE's trading accounts and it sounds as if he plans to trade in good size and frequency. I expect he will trade for other clients over time as well.

We've all agreed to use this as an opportunity to reboot our relationship and explore how we can do more business together. We know they are interested in flow equity and debt, preferreds and new issue across the spectrum. We should also be prepared to discuss what it would take for us to entertain opening a new OTC relationship.

As a reminder, JE keeps over \$100mm of deposits with us and does advisory work with Leon Black's family office. So I'd like to approach this as enthusiastically as we can.

Please let me know your availability July 17-19 and 24-27. We can meet at the DB offices or across the street with Rich Kahn.

Thanks

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