Subject: FW: Account Planning sessions [C]
From: Stewart Oldfield <[redacted]>
Date: Wed, 03 Jan 2018 18:18:27 -0500
To: Bradley Gillin <[redacted]>,
Cynthia Rodriguez <[redacted]

Fyi. Let’s discuss tmw

From: Samantha Harmon
Sent: Tuesday, January 02, 2018 5:31 PM
To: Stewart Oldfield <[redacted]>
Subject: Account Planning sessions [C]

Classification: Confidential

Hi Stew,

Below are your names for the account planning session that you had provided.

Please complete the attached template, which hopefully you will find is very much stream-lined.

I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done.

Would you be able to get back to me by Friday? If this isn’t possible, let me know and let’s see what we can figure out.

We will also need to schedule the 90 minute session which we are trying to complete in January.

I’m here all week if you have any questions or need any help.

Name

[redacted]

[redacted]

Southern Financial/Epstein

[redacted]

Kind regards,
Samantha Harmon

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