

Subject: RE: Pipeline/ Top 25s [I]
From: Jj Litchford <[REDACTED]>
Date: Mon, 19 Oct 2015 11:18:25 -0400
To: Stewart Oldfield <[REDACTED]>

Classification: For internal use only

Under Getz is:

Getz, Bert A.

Prospect

Scottsdale

AZ

Stewart Oldfield

Getz, George F.

Prospect

Scottsdale

AZ

Stewart Oldfield

Getz, Jr. Bert A.

Prospect

Deerfield

IL

Stewart Oldfield

Getz, Lynn M.

Prospect

Deerfield

IL

Stewart Oldfield

Globe Investment Company, LP

Prospect

Scottsdale

AZ

Stewart Oldfield

Olsen, Michael J.

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.

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JJ Litchford
Associate Banker

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

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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

Thanks

From: Jj Litchford
Sent: Friday, October 16, 2015 6:27 PM
To: Paul Morris; Stewart Oldfield
Subject: Pipeline/ Top 25s [I]

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Attached. The pipeline looks incomplete to me but let's review Monday.

Stew, the system only generates a Top 22 for you (but I notice Lindemann isn't on there, so possibly some converts due to being re-categorized as clients)

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