

Subject: RE: Our Data Integrity---Total Wealth of our Clients [I] [C]
From: Bradley Gillin <[REDACTED]>
Date: Wed, 08 Aug 2018 10:35:32 -0400
To: Ashok Eastman <[REDACTED]>
Stewart Oldfield <[REDACTED]>
Cc: Daniel Eisenberg <[REDACTED]>

Classification: Confidential

See attached.

Regards,
Brad

{cid:image002.gif@01D42F03.84FA4AB0}

Bradley Gillin
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Te [REDACTED]
Fa [REDACTED]
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From: Ashok Eastman
Sent: Friday, August 03, 2018 3:16 PM
To: Stewart Oldfield <[REDACTED]>
Cc: Bradley Gillin <[REDACTED]>, Daniel Eisenberg <[REDACTED]>
Subject: FW: Our Data Integrity---Total Wealth of our Clients [I]

Hi Stew,

I hope this finds you well. As a follow-up to our discussion and Patrick's email (below), I wanted to enlist your help with a project we are working on, to cleanup/validate some information about clients and prospects.

Please find attached a list of your clients and prospects, which we pulled from DBforce. If any client relationships are missing, please let us know.

And if any prospects are missing, please add a line in the spreadsheet and enter NEW in the prospect status and we will update DBforce. Please find instructions below, and if you have any questions, please contact me or Dan (cc'd).

Instructions:

- For client relationships, the most important field is Total Wealth (in red). However, if you do have information on liquid net worth, segment or industry (in pink - there are dropdown categories for each) please add it to the sheet.

- For prospects, it's the same - the Total Wealth field (orange) is most important but it would also be helpful if you could enter a Prospect Status (there is a dropdown menu) and last contact date - you can also add comments and the type of your last contact.

If you would, please send the completed spreadsheet back to Dan and me by the end of next week (August 10th). And please do not hesitate to let us know if you have any questions, or if we may be helpful.

Thanks in advance!

Kind regards,

Ashok

From: Patrick Campion [REDACTED]
Sent: Tuesday, July 24, 2018 4:01 PM

Subject: Our Data Integrity---Total Wealth of our Clients [I]

Classification: For internal use only

Team,

As Fabrizio mentioned at the last town hall, we are now focused on the growth stage of our business. One element of growth is an understanding of where you're starting from. Consequently, we need your help with a brief data enhancement exercise so that we can better know the wealth of our clients and prospects. This simple data element is either absent or very old in DbForce. This information will help us better understand if we have the right products and services for the clients and prospects we currently have.

For most of you, this task will take only 30 minutes or less of your time. SCM (Ashok Eastman, Daniel Eisenberg and Henry Clark) will support you with the task so that you won't have to input any information into dbForce. They will reach out to you shortly with details.

This exercise will also help prepare us for the dbForce system update in the near future. If you have any questions or concerns, please talk to Ashok, Dan or Henry. They can help.

Our goal is to have this data clean up completed by August 17.

Thanks for your helping out with this important task.

Kind regards,
Patrick Campion

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Patrick Campion
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