

Subject: FW: historical GMIS/banker scorecard data  
From: Stewart Oldfield <[REDACTED]>  
Date: Fri, 03 Nov 2017 10:09:34 -0400  
To: Bradley Gillin <[REDACTED]>  
Cc: Cynthia Rodriguez <[REDACTED]>

Fyi. Let's compare to this year at some point

From: Leslie Roth  
Sent: Thursday, November 02, 2017 10:08 PM  
To: Stewart Oldfield <[REDACTED]>  
Cc: Donna Kerrigan <[REDACTED]>  
Subject: RE: historical GMIS/banker scorecard data

Hi Stewart,

Here is a file which I retrieved from GMIS for the period 2014-2016. I pulled all client accounts which were assigned to either you or Paul Morris. The only team information available at that time has you assigned as the team.

Please review and let me know if it's what you are expecting.

Best Regards,

Leslie

From: Stewart Oldfield  
Sent: Thursday, 2 November, 2017 5:41 PM  
To: Leslie Roth  
Cc: Donna Kerrigan  
Subject: historical GMIS/banker scorecard data

Leslie,

I'm trying to compile my GMIS revenue data going back to 2014. I was teamed up with Paul Morris for much of that time, so some of the older revenues are likely listed as a team while more recently it would be individual. Is this something you can send me? Thanks

By year, here's how I think the data may be broken out:

2014 – Paul Morris individual and Morris/Oldfield joint

2015 – Morris/Oldfield joint

2016 – Morris/Oldfield joint and Oldfield individual

2017 – Oldfield individual (I have this data already)

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Stewart Oldfield, CFA, CAIA  
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