

Subject: RE: I'm free for the next hour or so [I]
From: Orion Choy [REDACTED]
Date: Fri, 19 May 2017 13:14:13 -0400
To: Stewart Oldfield <[REDACTED]>

Classification: For internal use only

Stew,

As discussed, our team is investigating large client inflows and outflows during Q4 of 2016 and YTD 2017. Attached is your client flow template. On the right hand side we have provided potential reasons for each inflow and outflow. We are hoping to compile reasons at the relationship level, so no need to describe each flow line by line. Thank you for helping out with this and please let me know if you have any questions!

Kind regards,

Orion

From: Stewart Oldfield
Sent: Friday, May 19, 2017 12:59 PM
To: Orion Choy [REDACTED]
Subject: I'm free for the next hour or so [I]

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