

Subject: RE: Epstein/Southern Financial
From: Stewart Oldfield <[REDACTED]>
Date: Wed, 25 Jan 2017 12:19:51 -0500
To: Vahe Stepanian <[REDACTED]>
Cc: Cynthia Rodriguez <[REDACTED]>

It did not. Will be part of a larger account review we do with him. It's on my list. Thanks for following up

From: Vahe Stepanian
Sent: Friday, January 20, 2017 3:31 PM
To: Stewart Oldfield
Subject: FW: Epstein/Southern Financial

Stew – did this ever happen? Probably worth revisiting.

Have a great weekend.

Best,

Vahe

From: Stewart Oldfield
Sent: Thursday, January 05, 2017 12:36 PM
To: Charlie Burrows
Cc: Bradley Gillin; Cynthia Rodriguez; Vahe Stepanian
Subject: Epstein/Southern Financial

Let's discuss what to show these guys to get them to move cash to the most efficient place for them and us

Thanks

From: Cynthia Rodriguez
Sent: Thursday, January 05, 2017 12:19 PM
To: Stewart Oldfield
Subject: RE: can you tell me what interest rate we are paying on JE's accounts? [I]

Attached is the spreadsheet of all accounts including account type, current (cash only) balances as of today, and interest rates. I've added a column for notes to distinguish the cash within the brokerage accounts. Let me know if you need anything else J

Kind regards,

Cynthia Rodriguez

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Cynthia Rodriguez
Assistant Vice President

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From: Stewart Oldfield
Sent: Wednesday, January 04, 2017 2:02 PM
To: Cynthia Rodriguez
Subject: can you tell me what interest rate we are paying on JE's accounts?

[I]

Classification: For internal use only

Let's look at cash balances by account and rate for each. Not sure whether he gets individual or business rates. Can you also see how much cash he has in his brokerage?

Thanks

Stewart Oldfield, CFA, CAIA
Director

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