

Subject: Re: J. Epstein & related accounts - your attention is needed [I]  
From: Stewart Oldfield <[REDACTED]>  
Date: Tue, 29 Nov 2016 16:02:41 -0500  
To: Vahe Stepanian <[REDACTED]>

Classification: For Internal Use Only

Thanks. I was at my desk for a total of 3 minutes when I got back from 60 wall and am out with another client right now. Let's catch up tmw.

Stewart Oldfield, CFA, CAIA  
Director

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From: Vahe Stepanian  
Sent: Tuesday, November 29, 2016 03:59 PM  
To: Stewart Oldfield  
Subject: FW: J. Epstein & related accounts - your attention is needed [I]

Classification: For internal use only

FYI

From: Joseph Dursi  
Sent: Tuesday, November 29, 2016 2:37 PM  
To: Zbynek Kozelsky; Joshua Shoshan; Daniel Sabba  
Cc: Donald Summer; Vahe Stepanian; Todd Stevens; Tazia Smith; Matthew Anderson  
Subject: RE: J. Epstein & related accounts - your attention is needed [I]

Classification: For internal use only

I agree

From: Zbynek Kozelsky  
Sent: Monday, November 28, 2016 2:41 PM  
To: Joshua Shoshan; Daniel Sabba  
Cc: Donald Summer; Vahe Stepanian; Todd Stevens; Tazia Smith; Joseph Dursi; Zbynek Kozelsky; Matthew Anderson  
Subject: J. Epstein & related accounts - your attention is needed [I]  
Importance: High

Classification: For internal use only

This is to follow up on a number of conversation we have regarding this client and his accounts.

This is the plan:

- 1) As of today Joshua Shoshan (CA ENJ) will take over coverage of these accounts and these accounts will reflect his CA number,
- 2) Daniel Sabba will no longer cover this client,
- 3) Josh's back-up coverage will be either Vahe Stepanian (primary) or Donald Summer (secondary),
- 4) Other WIC team members are not covering this client,
- 5) As of now this is a temporary arrangement until 1Q17 when other coverage changes may take place.

Do we all agree?

Thank you

Ziggy

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{cid:image003.png@01CFFD0A.6F882F50}

Zbynek "Ziggy" Kozelsky  
Director | Branch Administrative Manager

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