
From: Paul Morris [REDACTED]
Sent: 1/2/2013 2:24:27 PM
To: Amanda Kirby [REDACTED]
Subject: Fw: Initial prospects and conflicts [I]
Attachments: Potential initial conflicts.xlsx; Morris Leads 12-20-12.xlsx

Classification: For internal use only

Hi, we should discuss when you have time. Thanks

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----- Forwarded by P [REDACTED] on 01/02/2013 02:23 PM -----

From: Pa [REDACTED]
To: [REDACTED]
Date: 12/21/2012 01:07 PM
Subject: Initial prospects and conflicts [I]

Classification: For internal use only

Chip, I just received the initial run of names from Julie (attached as PM leads and potential conflicts). I will segment the list and add - estimated NW, investable assets, potential revenues and opportunity set. We should discuss and agree on a 3 -5 year business plan for revenue build and new assets.

Separately, we can study the top 250 or so hedge funds and top 100 private equity firms and cross reference which principals/entities are clients. Some I know/can get to and many are "touched" by our prime brokerage group, investment banking and various other products areas and senior management. We can do the run fairly quickly and we can discuss and set a plan. We had a good bit of success working with start up managers as well and on-boarded them to our GIO desk when too small for prime brokerage. Look forward to talking. Thanks

(See attached file: Potential initial conflicts.xlsx)

(See attached file: Morris Leads 12-20-12.xlsx)