
From: Amanda Kirby [REDACTED]
Sent: 1/7/2014 1:56:37 PM
To: Paul Morris [REDACTED]
Subject: Spreadsheet for Andrea [1]
Attachments: Morris WIC Spreadsheet.xlsx; pic25273.gif; pic03285.gif

Classification: For internal use only

Paul -- Take a look at the attachment and let me know if I can go ahead and send it to Andrea. Below is the criteria on how to fill it out

(See attached file: Morris WIC Spreadsheet.xlsx)

We have expanded capabilities across all wealth segments and need to focus them on the right clients. As we continue to provide cross-asset capital markets coverage, it is important to leverage WIC for investment idea generation and implementation solutions that are tailored to each client's needs.

In order to ensure that WIC (former MCG) is providing services ranging from holistic portfolio management, hedging and opportunistic trading, Chip would like for you to review your Brokerage accounts in the attached file. Please note the action items below and let me know if you have any questions.

Action Items:

1. Using the drop-down menu, identify the purpose for the open account (column G)
2. If the account is an accommodation account or part of a larger relationship, please identify the relevant relationship (column H) and whether the affiliated relationship has CBVs greater than \$10mm (column I)
3. Please send the completed file back to me by Friday, January 10, 2014

Thank you in advance for dedicating the necessary time to this matter.

Best,
Amanda Kirby

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