
From: Paul Morris [REDACTED]
Sent: 5/22/2015 11:07:37 AM
To: Chip Packard [REDACTED]
Subject: FW: Southern financial [I]

Classification: For internal use only

I stopped by, let me know a good time to chat

Paul Morris
Managing Director
Deutsche Bank Private Bank
[REDACTED]

-----Original Message-----

From: Todd Stevens
Sent: Wednesday, May 20, 2015 9:00 PM
To: Paul Morris
Subject: Re: Southern financial [I]

Let's wipe slate clean and hit restart. Daniel can deal with him.

> On May 20, 2015, at 8:39 PM, Paul Morris [REDACTED] wrote:

>
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>
> Todd, I appreciate the time today, we will circle back with you shortly, as I mentioned I spoke to je a week or so ago and made sure every thing is fine as you and I discussed, I also told him if there are any issues in the future that he should direct to me and I would handle. I don't think we should make a big case here as I see no risk with je. What we are more concerned about is daniel's ability to cover and manage large sophisticated clients.

>
> ----- Original Message -----
> From: Todd Stevens
> Sent: Monday, May 18, 2015 09:23 PM
> To: Paul Morris
> Subject: Re: Southern financial [I]

>
> Given legal and compliance hurdles in place it isn't that easy.

>
> I spoke to Daniel. Let's sit down over the next couple days. We just need to proceed with all cards on the table.

>
>
>> On May 18, 2015, at 9:12 PM, Paul Morris [REDACTED] wrote:

>>
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>>
>> Todd, let's connect again on this after you speak with Daniel, if he's not engaged on this Stewart and I will pick up coverage. Thanks again for the help.