
From: Melinda Roy [REDACTED]
Sent: 2/4/2016 9:26:55 AM
To: Paul Morris [REDACTED]; Stewart Oldfield [REDACTED]
Subject: Updated Pipeline [C]
Attachments: Pipeline 2.4.2016.xlsx

Classification: Confidential

If we just wanted to keep the customer/relationship on the list to remember them, I put "Introduction" in the Opportunity name with a probability of 0%.

Pending items:

Heptagon Capital - submitted for conversion to a customer, then I will add the derivative opportunity
Latona Advisors - can't find them online to submit as a lead..need the state where they are based. Did I misspell their name?

Let me know if there are other items to add, delete, or update. Thanks!

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

From: Paul Morris
Sent: Thursday, February 04, 2016 7:56 AM
To: Melinda Roy
Cc: Stewart Oldfield
Subject: Can you send over the updated pipeline, Thx