

Subject: RE: Entity CRP Form and Guidance [C]  
From: Melinda Roy [REDACTED]  
Date: Thu, 21 Apr 2016 11:53:00 -0400  
To: Paul Morris <[REDACTED]>

Classification: Confidential

Paul,

See attached for initial client outreach letter + all the forms they need to complete. You also need to brief the client on the phone before we can send these out. I addressed the letter to Jeffrey using the VI address. Not sure if you wanted it to go to the 345 Park office address.

Let me know if you want anything changed.

From: Paul Morris  
Sent: Thursday, April 21, 2016 11:14 AM  
To: Melinda Roy  
Subject: FW: Entity CRP Form and Guidance [C]

Classification: Confidential

Entity form

Paul Morris

Managing Director

Deutsche Bank Private Bank

Office [REDACTED]

Cell: [REDACTED]

From: Armen Brash  
Sent: Sunday, April 17, 2016 10:59 PM  
To: USPWM Private Bankers and Assistants  
Subject: Entity CRP Form and Guidance [C]

Classification: Confidential

All,

As promised, the final Entity form and guidance document are attached, to be obtained for new accounts as well as outreach to existing clients.

Please also find attached an updated training deck which contains an update to Day 2 process (p 9) and additional guidance specific to the Entity form (p 12-13).

These have all been posted to our mydb site: <https://mydb.intranet.db.com/-docs/DOC-295946>

Please let me know if you have any questions.

Best,  
Armen

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Armen Brash

Director

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