
From: J <jeevacation@gmail.com>
Sent: Thursday, February 7, 2019 3:08 PM
To: Kathy Ruemmler
Subject: Re: Review for call w/ Danielle Burness

Ridiculous

On Thu, Feb 7, 2019 at 11:07 AM Kathy Ruemmler <[REDACTED]>
=gt; wrote:

Begin forwarded message:
=br>

From: "Bur=ess, Danielle M - WASHINGTON DC" <[REDACTED]>
[REDACTED]

Date:

To: Kathy Ruemmler <[REDACTED]>, "Rodriguez, Arianne" <[REDACTED]>
[REDACTED]

=subject: RE: Review for call w/ Danielle Burness

</=lockquote>

Hi Kathy,

</=pan>

Yes, we were down last=year by 4.39% net of all expenses. The SP 500 was down a little
over=6% for the year and our mix of equities fared better than the overall marke= did. The good news is we have had a
nice bounce back in January and your total portfolio is up 4.61% since January =st.

</=pan>

I will be happy to wal= you through this in detail on our follow up call next Tuesday.

</=pan>

Enjoy your ski trip an= I look forward to speaking with you next week.

Danielle

</=pan>

</=pan>

From: Kathy Ruemmler [mailto: [REDACTED]]
<mailto: [REDACTED]>
Sent: Wednesday, February 6, 2019 5:23 PM
To: Rodriguez, Arianne [REDACTED]
Cc: Burness, Danielle M - WASHINGTON DC [REDACTED]
[REDACTED]
Subject: Re: Review for call w/ Danielle Burness

Hi Danielle,=u>

I have tried to make heads or tails of this document= and I really don't understand it. Did I lose money in the m=rket last year overall?

Thanks,

Kathy

On Feb 4, 2019, at 12:52 PM, Rodriguez, Arianne < [REDACTED]>
< [REDACTED]> wrote:

Hi Kathy,

The attached review is for your call with Danielle B=rness Wednesday, February 6th at 10a.

Have a great day!

Arianne Rodriguez

=C2 [REDACTED]

The Burness Group

Regis=ered Senior Client Associate

Merrill Lynch, Pierce, Fenner & Smith Inc.



For insights on the go follow Merrill Lynch on  [Twitter](http://www.wealthmanagement.ml.com/wm/pages/Merrill-Lynch-Social-Media.aspx?referrer=3Dvanity)
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remote-id 898010