

Message

From: Stackman, Scott [redacted]
Sent: 3/4/2014 4:39:30 PM
To: G Maxwell [redacted]
Subject: RE:

Hope your travels are going well. Did you have a chance to look at the proposal?

Scott L. Stackman
Managing Director - Investments
Private Wealth Advisor

UBS Private Wealth Management

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[http://financialservicesinc.\[redacted\]](http://financialservicesinc.[redacted])

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From: G Maxwell [mailto:[redacted]]
Sent: Tuesday, February 25, 2014 12:04 PM
To: Stackman, Scott
Subject: Re:

I am traveling currently and on the west coast. I am happy to look at Munis and don't need to keep such a large cash balance. I like to keep a couple of million in cash and invest the rest slowly .
Do send me options
Thanks
G

FACEBOOK <[redacted]>
TWITTER [redacted]
G+ <[redacted]>
PINTEREST [redacted]
INSTAGRAM [redacted]
PLEDGE [redacted]
THE DAILY CATCH [redacted]

From: Scott Stackman <[redacted]>
Date: Monday, February 24, 2014 19:47 PM
To: gmax <[redacted]>, "[redacted]" <[redacted]>
Subject: <no subject>

How are you. We are putting together your proposal and wanted to connect with you on a few questions.

1- how much cash would you like to have on hand for your personal brokerage accounts. Currently you have 2.8 million in brokerage and 3.1 million in savings accounts

2- you mentioned that you are very conservative. Your asset allocation at JPM is currently 43 percent cash 35 percent equity and 22 fixed income. Let's discuss if this is optimal for you and if such a large cash balance is necessary.

3- we noticed that there is a very small allocation to Munis. Is that by design. If so yours or JPM decisions.

Please let me know when you have a moment to discuss.

Thank you !

Please visit our website at

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