

Message

From: Bell, Jason [REDACTED]
Sent: 5/9/2014 4:47:19 PM
To: [REDACTED]
Subject: RE: Call with Ghislaine

[REDACTED] - Please pass this on to Ghislaine.

Ghislaine,

Thank you very much for reaching out. I genuinely appreciate your good wishes and it has been a pleasure working with you these past few years. I completely understand your desire to not rock the boat and given your experience at JPM, I would feel the same way about wanting stability with your finances.

Unfortunately, you are correct in the sense that each individual team at UBS essentially controls their own business and the collaborative environment takes place within teams as opposed to between them. The good news is that your assets are already in house and regardless of who you ultimately choose to work with, you will be in excellent hands working with a phenomenal investment platform. I suggest that you meet with Scott and his team and if you find that you would be more comfortable working with me I can take care of re-assigning the assets to my name behind the scenes with no disruption to you.

As always, I would love to be a valued resource as your financial situation evolves. I will continue to follow your progress with TerraMar and I hope for nothing but good fortune for you in all of your amazing business endeavors.

Regards,

Jason Bell
Vice President - Wealth Management

UBS Financial Services Inc.
[REDACTED]
[REDACTED]

Office: [REDACTED]
Cell: [REDACTED]
E-Fax: [REDACTED]
Toll Free: [REDACTED] ext 8647
[REDACTED]
[REDACTED]

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

From: [REDACTED] [mailto:[REDACTED]]
Sent: Friday, May 09, 2014 12:22 PM
To: Bell, Jason
Subject: Re: Call with Ghislaine

Jason - please see below from Ghislaine.

Dear Jason,

Happy that you have moved to UBS.

It has been quite a difficult few months with what happened at JP Morgan and the way it went down. I have just got settled at UBS and whilst I have yet to make any real decisions I am in no hurry to rock the boat again. I didn't realize how fragmented and sectioned it all is and would have asked for you to be on my team but I guess that does not work. I have a pre arranged meeting with my team next week and currently just can't face another move or more disruption.

Have a good weekend.

Best,
G

On 5/7/14 8:58 AM, "[REDACTED]" <[REDACTED]> wrote:

> [REDACTED]
>

>Good morning! Please let me know if Ghislaine is available for a call
>at her earliest convenience. I am available whenever she is free

>

>

>Regards,

>

>Jason Bell

>Vice President - Wealth Management

>

>UBS Financial Services Inc.

>[REDACTED]

>Office: [REDACTED]

>Cell: [REDACTED]

>E-Fax: [REDACTED]

>Toll Free: [REDACTED] ext 8647

>[REDACTED]

>[REDACTED]

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