

From: Paul Morris <[REDACTED]>

To: "jeffrey E." <jeevacation@gmail.com>, Richard Kahn <[REDACTED]>

CC: Stewart Oldfield <[REDACTED]>

Subject: FW: managed portfolio follow-up [C]

Date: Mon, 15 Jun 2015 20:54:30 +0000

Attachments: Approved_CIO_Strategies_Taxable_HFs_1Q15.pdf

Inline-Images: image006.png

Classification: **Confidential**

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From: Paul Morris
Sent: Tuesday, June 09, 2015 11:33 AM
To: jeffrey E.
Cc: Stewart Oldfield; Richard Kahn
Subject: managed portfolio follow-up [C]

Classification: **Confidential**

Dear Jeffrey,

Thanks for your time last week. To follow up on our discussion of initiating a managed portfolio, I've attached an overview of our global multi-asset portfolios that are built around our CIO views. [REDACTED] happy to get you on the phone with the head of our portfolio management team to discuss. These strategies are globally diversified multi asset class investment offerings that are constructed in our Asset and Wealth Management Group. Some key points:

- 1) A globally diversified multi-asset class portfolio offering
- 2) A disciplined investment process with a ten year track record of outperformance against appropriate blended benchmarks
- 3) An open architecture investment manager selection process
- 4) The ability to customize based on individual client restrictions or constraints

We look forward to setting up a call to discuss.

Sincerely,

Paul Morris
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