
From: Jj Litchford [REDACTED]
Sent: 9/18/2015 10:47:35 AM
To: Paul Morris [REDACTED]; Stewart Oldfield [REDACTED]
CC: Melinda Roy [REDACTED]
Subject: RE: Souther Financial Online Banking [I]

Classification: For internal use only

wanted to follow up on this.

Paul, do you want to have this conversation with Southern Financial today? We can get the docs prefilled and out to them.

JJ Litchford
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-----Original Message-----

From: Melinda Roy
Sent: Friday, September 11, 2015 3:30 PM
To: Jj Litchford
Cc: Paul Morris; Stewart Oldfield
Subject: RE: Souther Financial Online Banking [I]

Classification: For internal use only

I looked into how to set up an online banking account - it's pretty easy. There are two forms that we can Fedex to the client. I can pre-fill most of the information before sending over so it should not be difficult. The client can specify a designed admin (probably Bella) and then later authorize more individuals to have access to the online account. After we receive the completed forms, the online account should be running in a day or so. I can contact Artie Tremblay to conduct an online demo for the client once they have access.

I did not have an opportunity to bring this up with Bella today. JJ and I can call them Monday to talk about the transition if you are comfortable with that. Let me know!

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

From: Jj Litchford
Sent: Friday, September 11, 2015 11:35 AM
To: Paul Morris; Stewart Oldfield
Cc: Melinda Roy
Subject: Souther Financial Online Banking [I]

Classification: For internal use only

Paul, per our conversation, these 6 wires just came in... Melinda has capacity today and will be assisting.

She is also going to look into the process for getting them set-up with online banking/ training so that they can be self-sufficient with these moving forward.

JJ Litchford