
From: Paul Morris [REDACTED]
Sent: 9/11/2015 3:45:29 PM
To: Melinda Roy [REDACTED]; Jj Litchford [REDACTED]
CC: Stewart Oldfield [REDACTED]
Subject: RE: Souther Financial Online Banking [I]

Classification: For internal use only

let me reach out to them Monday first and then I will let you know and get it done, thanks for follow-up

Paul Morris
Managing Director
Deutsche Bank Private Bank
[REDACTED]

-----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
Associate Banker

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