
From: Paul Morris [REDACTED]
Sent: 9/9/2013 5:17:34 PM
To: Amanda Kirby [REDACTED]
Subject: Re: ACATS for Southern Financial/Trust [I]
Attachments: pic04738.gif; pic22065.gif; pic11856.gif; pic15013.gif; pic07420.gif; pic20383.gif

Classification: For internal use only

Need to get je to sign these as he is going out of town

----- Original Message -----
From: Amanda Kirby
Sent: 09/09/2013 04:13 PM EDT
To: Jay Lipman
Cc: Tazia Smith; Vahe Stepanian; Paul Morris
Subject: Re: ACATS for Southern Financial/Trust [I]
Classification: For internal use only

Thank you, Jay. I'll send the account docs to the client today and we can discuss the ACATS further when Paul is in the office tomorrow

Best,
Amanda Kirby

(Embedded image moved to file: pic04738.gif)

Amanda Kirby
Associate

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(Embedded image moved to file: pic22065.gif)

From: Jay Lipman/[REDACTED]
To: Amanda Kirby/[REDACTED],
Cc: Tazia Smith/[REDACTED], Vahe Stepanian/[REDACTED]
Date: 09/09/2013 04:03 PM
Subject: Re: ACATS for Southern Financial/Trust [I]

Classification: For internal use only

Hi Amanda,

As we discussed earlier, the ACAT's will be more complicated than usual due to the exotic nature of some of the assets in the accounts.

As for Jeepers, please find attached below the necessary brokerage documents for a corporate account. Please find Completion Instructions:
Account Agreement - Please complete highlighted areas on pgs. 1, 6, 7, 14, and 15