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**From:** Armen Brash [REDACTED]  
**Sent:** 5/24/2016 2:32:04 PM  
**To:** Stewart Oldfield [REDACTED]  
**CC:** Cynthia Rodriguez [REDACTED]; Brianna Fowler [REDACTED]  
**Subject:** RE: Individual Self-Certification Form [I]  
**Attachments:** USO - CRP Client Outreach - PAUL MORRIS.xlsx

Classification: **For internal use only**

Best,  
Armen



Armen Brash  
Director

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*Passion to Perform*

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**From:** Stewart Oldfield  
**Sent:** Tuesday, May 24, 2016 2:19 PM  
**To:** Armen Brash  
**Cc:** Cynthia Rodriguez; Brianna Fowler  
**Subject:** RE: Individual Self-Certification Form [I]

Classification: **For internal use only**

There are a lot of accounts associated with Jeffrey. Will track them all down and attach a list. Do you have the original list of accounts that we thought were in scope for this? Want to make sure I separate the personal and trust/entity accpunts.

Thanks

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**From:** Armen Brash  
**Sent:** Tuesday, May 24, 2016 2:15 PM  
**To:** Stewart Oldfield  
**Subject:** RE: Individual Self-Certification Form [I]

Classification: **For internal use only**

A few things

- 1) Account #s need to be populated on these
- 2) The need to be signature verified
- 3) You must complete the RM affirmation (attached) for each account holder

We also need to track down the entity ones—he never sent them to me, but in the email he says he sent to Aracely...