

Subject: RE: Souther Financial Online Banking [I]  
From: Paul Morris <[REDACTED]>  
Date: Fri, 11 Sep 2015 15:45:29 -0400  
To: Melinda Roy <[REDACTED]>, Jj Litchford <[REDACTED]m>  
Cc: Stewart Oldfield <[REDACTED]>

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  
Office: [REDACTED]  
Cell: [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]

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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]

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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.

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JJ Litchford  
Associate Banker

Deutsche Bank Trust Company Americas  
Deutsche Asset & Wealth Management  
345 Park Avenue, 24th Floor  
New York, New York 10154  
[REDACTED]  
[REDACTED]  
[REDACTED]

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

From: bellaklein [mailto:[REDACTED]]  
Sent: Friday, September 11, 2015 11:20 AM  
To: Jj Litchford  
Cc: Darren Indyke; Richard Kahn  
Subject: (6) wires

Jj,  
Please process and confirm the attached (6) wires,

Thank you,  
Bella

[REDACTED]  
Tel: [REDACTED]