

Subject: Re: Southern financial [I]
From: Todd Stevens <[REDACTED]>
Date: Wed, 20 May 2015 20:59:49 -0400
To: Paul Morris <[REDACTED]>

Let's wipe slate clean and hit restart. Daniel can deal with him.

> On May 20, 2015, at 8:39 PM, Paul Morris <[REDACTED]> wrote:

> Classification: For Internal Use Only

> Todd, I appreciate the time today, we will circle back with you shortly, as I mentioned I spoke to je a week or so ago and made sure every thing is fine as you and I discussed, I also told him if there are any issues in the future that he should direct to me and I would handle. I don't think we should make a big case here as I see no risk with je. What we are more concerned about is daniel's ability to cover and manage large sophisticated clients.

> ----- Original Message -----

> From: Todd Stevens
> Sent: Monday, May 18, 2015 09:23 PM
> To: Paul Morris
> Subject: Re: Southern financial [I]

> Given legal and compliance hurdles in place it isn't that easy.

> I spoke to Daniel. Let's sit down over the next couple days. We just need to proceed with all cards on the table.

>> On May 18, 2015, at 9:12 PM, Paul Morris <[REDACTED]> wrote:

>> Classification: For Internal Use Only

>> Todd, let's connect again on this after you speak with Daniel, if he's not engaged on this Stewart and I will pick up coverage. Thanks again for the help.