

**Completed Activities from January 01, 2021 thru April 06, 2023**

List sorted by Completion Date and Time

Completion Date	Type	Activity Date	Description	Need	Maturity Date	Amount
08/18/22	Note	08/18/22	Account Verification Letter: New Account, Significant Change or Every Three Year			
05/20/22	Note	05/20/22	Address Verification Letter: Address / Name Change			
10/12/21	CBk	10/12/21	Reached out via email in regards to moving his father from his granddaughters account. Can you please call him Tue, 12-Oct-2021 8:53am (BOA, MS):			
10/08/21	Call	10/08/21	Send zoom link for Tom Price annual review and email both Tom and Jeff for zoom invite.			
10/08/21	ToDo	10/11/21	Send zoom link for appointment at 9:30			

Figure 1: Notes form 92696230 (Brook shows that she had no issues working with Jeff)