

Subject	Note	Start Date	Record Modifi	Activity Contact
Partnership	<p>Several calls today from Matt regarding those small details between the Partner Levels.</p> <p>Leaning towards \$5K, but on the fence to go higher.</p> <p>Wanted pro-rated. Advised that needed our Board approval. He moved on from there.</p> <p>He needs approval to pull the trigger, that person had left the office at 4:30 pm.</p>	11/01/2018	11/01/2018	Matt Pileski-Hilltop Securities
Follow Up	<p>Following up on Friday, 11/2 at 2:00 pm</p> <p>Keith emailed me about getting a list of attendees from the Conference. I informed him they were a a benefit of Partnership/Exhibits. I reached out again about SunTrust becoming a Partner and requested a time that I could give him a call to discuss</p>	10/31/2018	10/31/2018	Keith Kadish-SunTrust
Partnership	<p>Set up call for Tuesday, 11/6 at 1:00 pm to discuss Partnership</p>	10/31/2018	11/01/2018	Keith Kadish-SunTrust
Sponsorship	<p>Call Bikram. Discussed CPFO courses and how a sponsorship would work.</p> <p>Notified him that we did not have dates set but we had contracted with the instructor.</p>	10/30/2018	11/01/2018	Bikram Chadha-PFM
Partnership	<p>Wants me to follow up when we have confirmed dates.</p> <p>Follow Up email with Matt regarding Partnership.</p>	10/29/2018	11/01/2018	Matt Pileski-Hilltop Securities
Course Sponsorship	<p>Further discussion about sponsoring either the CPFO course or an IGAS course. Took brochure. Follow up call</p>	10/26/2018	11/01/2018	Bikram Chadha-PFM

Partnership

Sent email reminder to Mark about Partnership.

09/04/2018 09/20/2018 Mark Edwards-TD
Bank

Received a reply from a TD staffer that he was on PTO

Relayed the info.

Inquiry

Inquiry about Speaking Opportunities, email sent regarding
Partnerships/Sponsorships. Email bounce back

08/29/2018 09/21/2018 Erika Holle-IGM
Tech