Draft e-mail:

To: Joan Baez, DEF Regional Bank President

From: Leon M. Smith

Date: April 7, 2021

Re: Fwd: PR meeting

Hello, Joan,

I hope your whitewater rafting trip last week went really well! Thanks for sending me the e-mail below about the PR meeting for the Board prep. I don’t know if I can attend it – I am supposed to be at a conference with John and the team that whole week and we are late making our travel arrangements.

Do you remember Malcom Oh? I just realized I had not told you that I had lunch with him recently and he provided some information about a new client possibility. It is a $20mm company who is banking with ABC National now and they dissatisfied with them. Malcolm offered to do an e-mail introduction with you and I am now just remembering that. Is that something you want Malcolm to do? When would be a good time for that connection? Here is more about the company: It is a family business and the father is about to turn it over to the sun and daughter (that can be dicey!). They are located in Winchester with a second location in Hampton. I think it sounds promising and would be willing and happy to consider facilitating that introduction whenever you wish. One final thing: Want to ride together to the Chamber Valor awards luncheon next month – I think it is the first event they will hold in person.

LMK,

LMS