


Client Requests ☆



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Title	ClientName	RequestDetails	Status
Hi there, I'd like to update my contact details on file and request a new statement for the last quarter. Thanks!	Emma Green	Hi there, I'd like to update my contact details on file and request a new statement for the last quarter. Thanks!	New
<div>○</div> I'm planning for retirement and would like some information on your managed fund options. Could you please send me a brochure?	...  David Kumar	I'm planning for retirement and would like some information on your managed fund options. Could you please send me a brochure?	New
I've just noticed a fraudulent transaction on my statement from yesterday for \$2,500. Please freeze my account and call me as soon as possible	David	I've just noticed a fraudulent transaction on my statement from yesterday for \$2,500. Please freeze my account and call me as soon as possible	New
urgent: I cannot access my investment account. I keep getting an error message. I need to place a time-sensitive trade this morning. Please help immediately.	Michael Chen	urgent: I cannot access my investment account. I keep getting an error message. I need to place a time-sensitive trade this morning. Please help immediately.	New



Deleted 2 items

