

INTERNAL MEMO

Date: March 15, 2024

RE: Project Handover Documentation

To: Sarah Johnson

From: Michael Chen

Department: Customer Relations

Branch: Northeast Regional Office

Dear Team,

This document contains sensitive information regarding the handover of the Smith & Associates account.

1. Primary Contact Information:

Client: Robert Smith

Position: Chief Financial Officer

Email: robert.smith@smithassociates.com

Phone: (555) 123-4567

Address: 742 Maple Avenue, Suite 300, Boston, MA 02108

2. Secondary Contacts:

- Jennifer Williams (Legal Counsel)

Contact: jwilliams@legalfirm.com, +1-617-555-0123

- David Thompson

Office: 123 Corporate Drive, New York, NY 10001

Mobile: 555.777.8888

3. Account Details:

Account Manager: Emily Rodriguez

Client ID: SA-2024-789

Social Security: 123-45-6789

Tax ID: 12-3456789

4. Project Stakeholders:

• Technical Lead: James O'Connor

Email: joconnor@techteam.net

Extension: x4567

• QA Manager: Patricia Lee-Wong

Contact: (555) 999-0000

• External Consultant: Dr. Alexander Martinez, PhD

Email: a.martinez@consultancy.org

Cell: +1 (555) 888-7777

5. Additional Information:

Previous handling was done by Tom Wilson (tom.wilson@company.com) who has since moved to our Singapore office. For urgent matters, you can reach him at +65 9123 4567.

6. Client's Banking Information:

Account Holder: Smith & Associates LLC

Account Number: 1234567890

Routing Number: 021000021

Bank: Chase Manhattan

Branch: Financial District

7. System Access:

Username: rsmith_admin

Password: S3cur3P@ss2024!

IP Address: 192.168.1.100

Please ensure all communication follows our security protocols. For any questions, contact our compliance officer Mark Anderson at manderson@compliance.company.com or extension 5555.

Best regards,

Michael Chen

Senior Account Manager

Direct: (555) 234-5678

michael.chen@company.com

CC:

- Lisa Brown (HR Director)
- Kevin O'Brien (Risk Management)
- Maria Garcia-Lopez (Compliance)