



Dashboard

SECTIONS

Manage Users

Group Data

Contact Data

Add Contacts

Contacts List

Add Notes

Add Contact Files



Notes List of Ghulum Murtaza

Add Note

Note Detail



spoke to client today after application came in. informed client that day trading was risky and he would lose money doing it on average. client is retired so in the surface, daytrading with money that is earmarked for retirement is not a good idea. client stated he has two accounts with cobra trading he is moving here. signed off on the account sent to craig for approval.

Cancel

today after applic
that day trading

Last