

Subject: Re: Fw: Got good feedback from call today w/ Jeffrey Epstein [I]
From: Caroline Kitidis <caroline.kitidis@db.com>
Date: Thu, 23 Jan 2014 09:25:48 -0500
To: Chip Packard <chip.packard@db.com>

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Belfer - Jen Wexler is trying to set up a meeting - they did some more one off structured customized trades w/GS but werent an 'active trading account' but we should definitely go see them and see how we can work w/ them.
Eddie - we went and saw you have my notes and follow-ups - some stuff to do there.
Kovner - dont know?

Kind regards,

Caroline Kitidis

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Caroline V. Kitidis
Managing Director | Head of Key Client Partners & Wealth Investment Coverage - Americas

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From: Chip Packard/db/dbcom@DBAMERICAS

To: "Caroline Kitidis" <caroline.kitidis@db.com>,

Date: 01/11/2014 08:48 AM

Subject: Fw: Got good feedback from call today w/ Jeffrey Epstein [I]

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What other accounts should we involve Vinit? I think we should consider Eddie Stern, Belfer and Kovner's new family office, among others. Interested in your views.

Chip Packard
Managing Director
Co-Head, Wealth Management Americas
Deutsche Asset and Wealth Management


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From: Vinit Sahni
Sent: 01/11/2014 07:39 AM GMT
To: Caroline Kitidis
Cc: Dario Schiraldi/db/dbcom; Chip Packard/db/dbcom@dbamericas
Subject: Re: Got good feedback from call today w/ Jeffrey Epstein [I]

Thanks Caroline. Am glad it went well. Kudos to paul for bringing over the account and tazia was all over it, both well prepared and punchy.

Vinit

On 10 Jan 2014, at 20:31, "Caroline Kitidis" <caroline.kitidis@db.com> wrote:

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Vinit, just wanted to give you kudos for your call today with our client Jeffrey Epstein. He was pleased with the dialogue and was complimentary.

Dario, by way of background, this was a KCP account (new) that we opened and brought over from JPM, \$200mm of new assets, to trade capital markets - onboarded in past 2 months. Paul Morris is the banker (from JPM) and Tazia is managing the relationship/ trading given her Capital markets KCP focus. He's started to do some trading but he really wants institutional service and ideas. Vinit and Tazia reviewed his holding today at the client meeting, and gave him advice on what to do with the existing portfolio as well as new ideas.

This is the same client I want to take you to for dinner but he is not here next week so we will do it when your back in town.

He has another \$100mm he mentioned he would send over, at some point but I think we need to really make a good effort on trading ideas, wins, good execution etc, get his trust and confidence. Additionally, he has many many important relationships. 1) Leon Black who I met the last time we were at his home, who has \$500mm of cash that he wants to put to work (would like to get Michele in front of him soon...), Larry Summers, among a number of other people.

So in short a very good opportunity, we think this is hopefully a Tier 1 relationship, and Vinit and team have been v helpful and will continue to be in the coming months.

Kind regards,

Caroline Kitidis

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