

Custom Links		Temporary Exception Valid Until	
<a href="#">View DB Accounts and Revenue</a>	<a href="#">Client/Assets At Risk</a>	<a href="#">Create Annual Client Update</a>	
<a href="#">Request Customer Deletion</a>	<a href="#">Log Client Complaint</a>	<a href="#">Request ACU Contact Exemption</a>	
<a href="#">Request Primary Officer Change</a>	<a href="#">Import Documents</a>	<a href="#">View Exemption Guidelines</a>	
<a href="#">Request New Relationship</a>	<a href="#">Export Documents</a>	<a href="#">Generate Key Relationship Report</a>	
<a href="#">Launch NAO Wizard</a>	<a href="#">View Documents From Repository</a>	<a href="#">Launch ALAT Process</a>	
<a href="#">View NAO Cases</a>		<a href="#">View Loan Covenant Details</a>	
<a href="#">Launch Due Diligence</a>			

**Classification**

Potential New Revenue	<\$25 K	Unconfirmed Investor Status	
Client Satisfaction	Satisfied	Investor Status Definitions	<a href="http://pwm.intranet.db.com/new/filehandler.php?getFile=us/docs/InvestorStatusAddendum__10_24_07.pdf">http://pwm.intranet.db.com/new/filehandler.php?getFile=us/docs/InvestorStatusAddendum__10_24_07.pdf</a>
Industry		* DB is Trustee/Co-Trustee	<input type="checkbox"/>
Revenue Tier	D (< \$25K)	* DB Employee?	<input type="checkbox"/>
Forbes Ranking		* DB managed PIC	<input type="checkbox"/>
		* Bearer Shares?	<input type="checkbox"/>
Segment			

**Financial Profile (KYC Information)**

* Net Worth (Individual)	\$500 MM +	Investment Objective	
* Investable Assets	\$50 MM - 100 MM	Risk Tolerance	
* Estimated Annual Income (Individual)	\$10,000,000	Sophistication	
* Estimated Annual Gross Income (Entity)		Source Of Income	
* Estimated Annual Net Profit (Entity)		* Source of Wealth (Individual)	Investment; Business Owner
		* Description of Wealth/Entity Assets	Epstein began his financial career in 1976 as an options trader at Bear Stearns and became a partner in 1980. In 1982, Epstein founded his own financial management firm, J. Epstein & Co., managing the assets of clients with more than a billion in