

Primary Officer [Stewart Oldfield](#)
 Banking Officer [Stewart Oldfield](#)

External Affiliations [New Affiliation](#)
 No records to display

Secondary Account Roles
 No records to display

Ticklers [New Tickler](#)
 No records to display

Trust Administrative Reviews [New Trust Administrative Review](#)
 No records to display

IA Reviews [New IA Review](#)
 No records to display

Cases [New Case](#) Cases Help

Action	Case	Case Record Type	Routing Amount	Case Subject	Date/Time Opened	Status	Owner	Created By Alias	Pay To	Priority
Edit Cls	01452496	Cash Disbursement - Wire - USD - Banking	\$5,510.75		9/3/2015 3:18 PM	Verified	Banking STP Processing	PB S-NY		High
Edit Cls	01421269	Cash Disbursement - Wire - USD - Banking	\$3,680.00		6/26/2015 11:34 AM	Verified	Banking STP Processing	PB S-NY		High
Edit Cls	01418036	Cash Disbursement - Wire - USD - Banking	\$1,800.00		6/18/2015 1:27 PM	Verified	Banking STP Processing	PB S-NY		High
Edit Cls	01395299	Cash Disbursement - Wire - Non-USD - Banking	\$31,815.06		5/15/2015 1:10 PM	Verified	GTO - Banking (Financial)	PB S-NY		High
Edit Cls	01392851	Cash Disbursement - Wire - USD - Banking	\$63,628.88		5/11/2015 11:45 AM	Verified	Banking STP Processing	PB S-NY		High

[Show 5 more »](#) | [Go to list \(13\) »](#)

DB Accounts Revenue

Action	Revenue Period	Account Id	Flows In	Flows Out	Monthly Revenue	YTD Flows In	YTD Flows Out	YTD Revenue
	2016-06	42953707	682.99	-49,643.15	236.00	601,171.21	-323,042.15	1,642.00
	2016-05	42953707	0.00	-45,905.92	262.00	600,488.22	-273,399.00	1,406.00
	2016-04	42953707	181.90	-48,688.08	274.00	600,488.22	-227,493.08	1,144.00
	2016-03	42953707	306.32	-63,931.42	294.00	600,306.32	-178,805.00	870.00
	2016-02	42953707	0.00	-58,611.58	298.00	600,000.00	-114,873.58	576.00

[Show 5 more »](#) | [Go to list \(32\) »](#)

Open Activities [New Task](#) [New Event](#) Open Activities Help
 No records to display

Activity History [Log a Call](#) [Mail Merge](#) [Send an Email](#) Activity History Help
 No records to display

Notes & Attachments [New Note](#) [Attach File](#) Notes & Attachments Help
 No records to display

DB Account Portfolios
 No records to display

TEAS History
 No records to display