
From: Stewart Oldfield [REDACTED]
Sent: 1/3/2018 6:18:27 PM
To: Bradley Gillin [REDACTED] Cynthia Rodriguez [REDACTED]
Subject: FW: Account Planning sessions [C]
Attachments: AP Template - Banker input.docx

Fyi. Let's discuss tmw

From: Samantha Harmon
Sent: Tuesday, January 02, 2018 5:31 PM
To: Stewart Oldfield [REDACTED]
Subject: Account Planning sessions [C]

Classification: **Confidential**

Hi Stew,

Below are your names for the account planning session that you had provided. Please complete the attached template, which hopefully you will find is very much stream-lined. I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done. Would you be able to get back to me by Friday? If this isn't possible, let me know and let's see what we can figure out. We will also need to schedule the 90 minute session which we are trying to complete in January.

I'm here all week if you have any questions or need any help.

Name
Third Lake
Elysium
General Atlantic
Safanad
Dzialga
Lindemann
Southern Financial/Epstein
Jockey Club
Deering/Crosby
Tisch

Kind regards,
Samantha Harmon



Samantha Harmon
Sales Support Analyst

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