2018 Account Planning

RM contribution

Relationship Name: [Type Here]
Banker Team: [Type Here]
GCIS Number: [Type Here]

Relationship Team:

ISG:

Trust/Custody:

DPM:

WPS:

KCP:

Deposits:

Lending:

Other:

Client Profile

*{Please add a narrative on the client here, based on what you know and your relationship which could include any or all of the below **which is meant to be a guide**}*

[Type here]

- *Customer profile, background information and source of wealth details*
- *Customer's current occupation and source of income*
- *Decision makers other than customer*
- *History of relationship with customer (relationship with DB and personal relationship with client)*
- *Customer's business with other DB divisions*
- *Client's family/business*
- *Where does the Customer bank aside from DB? Include the names of the institutions, products and estimated assets. (if known)****

**** If this is a lending relationship, please include a financial statement.*

Opportunities and Challenges

*{Please add a narrative on the client here, based on what you know and your relationship which could include any or all of the below **which is meant to be a guide**}*

[Type here]

- *What are the key opportunities to grow the relationship?*
- *What are the Customer's financial objectives?*
- *What issues and/or challenges is the Customer facing?*
- *What are the key roadblocks to giving DB more business?*