

Action: Officer Role	Officer
Primary Officer	Stewart Oldfield
Banking Officer	Stewart Oldfield

External Affiliations

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	[REDACTED]	Business Internet Banking - Wire	\$150,000.00		8/5/2016 1:05 PM	Verified	Banking STP Processing	TECH		High
Edit Cls	[REDACTED]	Business Internet Banking - Wire	\$38,374.56		8/4/2016 11:32 AM	Verified	Banking STP Processing	TECH		High
Edit Cls	[REDACTED]	Business Internet Banking - Wire	\$1,000.00		8/1/2016 3:49 PM	Verified	Banking STP Processing	TECH		High
Edit Cls	[REDACTED]	Business Internet Banking - Wire	\$25,307.35		7/19/2016 4:18 PM	Verified	Banking STP Processing	TECH		High
Edit Cls	[REDACTED]	Internal Cash Transfer - Banking to G+	\$100,000.00		7/19/2016 3:57 PM	Verified	State Street STP	PB.S-NY		High

[Show 5 more »](#) | [Go to list \(50+\) »](#)

DB Accounts Revenue

Action	Revenue Period	Account Id	Flows In	Flows Out	Monthly Revenue	YTD Flows In	YTD Flows Out	YTD Revenue
	2016-06	[REDACTED]	2,001,172.33	-1,930,848.11	1,103.00	9,106,221.34	-7,812,887.78	3,583.00
	2016-05	[REDACTED]	200,429.90	-522,056.73	883.00	7,105,049.01	-5,882,039.67	2,480.00
	2016-04	[REDACTED]	2,550,000.43	-3,090,632.58	1,066.00	6,904,619.11	-5,359,982.94	1,597.00
	2016-03	[REDACTED]	4,354,618.68	-2,269,350.36	531.00	4,354,618.68	-2,269,350.36	531.00

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

DB Account History

No records to display