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	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	████	682.99	-49,643.15	236.00	601,171.21	-323,042.15	1,642.00
	2016-05	████	0.00	-45,905.92	262.00	600,488.22	-273,399.00	1,406.00
	2016-04	████	181.90	-48,688.08	274.00	600,488.22	-227,493.08	1,144.00
	2016-03	████	306.32	-63,931.42	294.00	600,306.32	-178,805.00	870.00
	2016-02	████	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