

2018 Account Planning
Financials

Relationship Name	SAFANAD
Banker Team	Team New York12
1. CRM	Stewart Oldfield
Rel. ID Number	

dbForce Data			
Relationship Net Worth	>\$500 M	Relationship Segment	0
Relationship Investable Assets	>\$500 M	Relationship Segment Description	0
Relationship Classification	Tier 2	Industry Group	0
Breadth of Client Needs (# products)	0	Industry	0
Revenue Potential (\$m p.a.)	>\$500K		
Source of Wealth	Salary / Earnings		
	0		
Description of Wealth/Entity Assets			

Forbes 400 Ranking (as of Nov 2017) / Public Records			
Forbes 400 Rank	0	Net Worth	0 \$bn

Description	Revenues YTD		CBV		NNA YTD		NNL YTD	
	Nov-17	Nov-16	Nov-17	Nov-16	Nov-17	Nov-16	Nov-17	Nov-16
Lending Other Structured	0	0	11,345	0				
Lending Mortgages	0	0	0	0				
Lending Lombard	0	0	0	0				
Lending Structured Solutions	0	0						
Total Lending	0	0	11,345	0				
Deposits	8	0	5,000	0				
L&D Central Mgt	0	0						
Total L&D	8	0	16,345	0				
Capital Markets	1,500	0	99,860	0				
DPM	938	0	2,917,258	0				
Custody only	0	0						
Wealth Planning Solutions	0	0		0				
Fund Solutions	0	0	0	0				
WAM	0	0	0	0				
Other	0	0	0	0				
Total CPS	2,438	0	3,017,118	0				
Partnership	0	0						
Total	2,446	0	3,033,463	0	2,952,438	0	11,345	0

Financial Ranking (by all Relationships in GMT America)			
Revenue Rank	3,515	CBV Rank	1,310

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