

2018 Account Planning
Financials

Relationship Name	LINDEMANN JR GEORGE
Banker Team	Team New York12
1. CRM	Stewart Oldfield
Rel. ID Number	

Effective Date			
Relationship Net Worth	>\$500 M	Relationship Segment	Real Estate
Relationship Investable Assets	\$50 - 100 M	Relationship Segment Description	0
Relationship Classification	Tier 1	Industry Group	Other
Breadth of Client Needs (# products)	1 - 2	Industry	0
Revenue Potential (\$m p.a.)	\$100 - 250K		
Source of Wealth	0		
	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	0	0				
Lending Mortgages	0	0	0	0				
Lending Lombard	0	0	0	0				
Lending Structured Solutions		0						
Total Lending	0	0	0	0				
Deposits	168	221	56,563	55,809				
L&D Central Mgt	0	0						
Total L&D	168	221	56,563	55,809				
Capital Markets	0	1,000	1,053,000	1,106,950				
DPM	0	0	0	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	0	1,000	1,053,000	1,106,950				
Partnership	0	0						
Total	168	1,221	1,109,563	1,162,759	754	165,000	0	0

Financial Ranking (by all Relationships in GMT America)			
Revenue Rank	4,358	CBV Rank	1,892

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