

2018 Account Planning
Financials

Relationship Name	JOCKEY CLUB
Banker Team	Team New York14
1. CRM	Stewart Oldfield
Rel. ID Number	

Effective Date			
Relationship Net Worth	\$100 - 500 M	Relationship Segment	Entrepreneur
Relationship Investable Assets	\$50 - 100 M	Relationship Segment Description	0
Relationship Classification	Tier 3	Industry Group	0
Breadth of Client Needs (# products)	1 - 2	Industry	Not For Profit
Revenue Potential (\$m p.a.)	\$250 - 500K		
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

Component	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	38,958	37,015	3,128,390	1,977,808				
L&D Central Mgt	0	0						
Total L&D	38,958	37,015	3,128,390	1,977,808				
Capital Markets	1,181	1,703	5,073,531	5,165,566				
DPM	0	0	0	0				
Custody only	0	0						
Wealth Planning Solutions	0	0		0				
Fund Solutions	0	0	49,232,113	37,563,390				
WAM	0	0	0	0				
Other	0	0	0	0				
Total CPS	1,181	1,703	54,305,644	41,728,956				
Partnership	0	0						
Total	40,139	38,718	57,434,034	44,706,765	3,515,315	216,949	0	0

Financial Ranking (by all Relationships in GMT Americas)			
Revenue Rank	1,125	CBV Rank	174

Strictly Confidential