
From: Stewart Oldfield [REDACTED]
Sent: 1/20/2017 1:45:34 PM
To: Cynthia Rodriguez [REDACTED]
Subject: RE: account planning [C] [I]

Classification: **For internal use only**

Awesome. This feels like a next week thing. I'll be reenergized by then . . . Thanks for pulling it all together

From: Cynthia Rodriguez
Sent: Friday, January 20, 2017 1:34 PM
To: Stewart Oldfield
Subject: RE: account planning [C]

Hey,

So I left the print outs of the ones I completed so far, but I'm missing details. I figured we could go over it when you have time today or next week. Below is what I'm missing for your list as a heads up:

54 Madison Partners/ Orix/Safanad:

- Contact names, numbers emails etc
- The company's plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

Elysium/Shamrock/Crestline:

- Contact names, numbers emails etc
- Source of wealth details
- The company names and plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

TFMG, LLC (Tisch)

- Contact names, numbers emails etc
- The company's plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

Kind regards,

Cynthia Rodriguez



Cynthia Rodriguez
Assistant Vice President

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