Orix GM
only Included in July planning
Southern Financial (Epstein) Included
in November planning
Third Lake Dursi/King
54 Madison GM only
Tisch Dursi/King
Shamrock
Safanad
Crestline GM only
Cliff Illig

Week of Jan. 30th is pretty open for these discussions.

Thanks

From: Andrew Gallivan
Sent: Tuesday, January 17, 2017 8:35 AM
To: Mary A Coleman; Brian P Convey; Joanne Jensen; Stewart Oldfield; Elizabeth Payne; Joseph Sabbagh; Terri Sohrab; Terrence F Tangney; Rosemary Vrablic
Cc: Mamie Holland
Subject: [C]

Classification: **Confidential**

As you've heard Patrick say in previous meetings, our goal is to have a plan for the majority of our clients and important prospects by 3/31/17. Thoughtful client planning, with full participation from your product partners, will identify the growth opportunities for 2017. Thereafter it will be up to you and your product partners to execute against those opportunities with urgency so that we can achieve momentum early in the year. It's important.

These sessions will be different than what you may have experienced in the past. The focus will be on the experience during the sessions and the outcomes. Here is what you can expect:

Preparation for the sessions:

- Let's discuss 10 of your clients for this first round of planning sessions. These should be your top 10 clients/prospects for revenue growth in 2017. They may not be your existing largest clients.

- By Monday January 23rd, please send me the names of the top 10 clients/prospects in your portfolio for growth potential in 2017. In addition, please include any clients who were previously part of the top 100 client planning exercise.

- By Monday January 23rd , please send me the names of the ISG/DPM partner, lending specialists and wealth planning specialists aligned to those relationships identified. I'll want to communicate with them directly about their role in the planning sessions.

- If any of the 10 clients has an existing lending relationship, then I ask that you do the following. Please notify the lending specialist and your ISG specialist. They are responsible for meeting together **before** the planning sessions so that the ISG specialist can review the financial disclosure on file and identify potential cross-sell opportunities based upon what we know about the client's balance sheet. They will be responsible for coming to your planning session with potential cross-sell ideas.