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**From:** Stewart Oldfield [REDACTED]  
**Sent:** 7/18/2016 2:42:23 PM  
**To:** Brianna Fowler [REDACTED]  
**Subject:** FW: Account Planning [C]  
**Attachments:** Client List B\_Paul Morris.xlsx; Account Planning Initiative\_Template.xlsx

Classification: **Confidential**

Please start to fill this in from the pipeline then you and I can complete together. Let's do it for:

Southern Financial (from list B)  
Elysium  
Third Lake  
Orix

Thanks

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**From:** Andrew Gallivan  
**Sent:** Monday, July 18, 2016 1:06 PM  
**To:** Stewart Oldfield  
**Subject:** Account Planning [C]

Classification: **Confidential**

As I mentioned on the Monday sales call, The Wealth Management ExCo, with sponsorship from Fabrizio, is initiating a global account planning exercise aimed at identifying revenue enhancement opportunities across our client base. In the Americas, this exercise will initially focus on our largest clients (~top 100) plus any near-term opportunities identified by you and then eventually expanded over the course of the year. A half day workshop with senior leadership, product heads and relationship managers will be organized during the week of July 25 (specific date to be confirmed) to conduct a detailed review of identified opportunities and agree action plans.

In preparation for the workshop, we request support from each banker team in identifying potential opportunities and prospects:

- A. At a minimum, identify at least 3 relationships with potential for revenue enhancement across your client base
- B. Separately, evaluate whether there are any revenue enhancement opportunities for clients you cover that are in the attached list

For all clients identified in A and all clients in list B, please complete the attached account planning template. The responses will be aggregated in to a single database for discussion at the workshop. An illustrative example of a completed account planning template and system generated financials for clients in list B have been included for reference.

Please provide your responses / completed templates to Manish Pahlajani by close of business on Wednesday, July 20.

Thank you for your focus on this and apologize for the short time frame

Andrew