

- Laura Farischon pitched the notion of looking on the PE & Hedge Fund public list to see if there are any possible prospects there
- Another option that was pitched was covering hedge funds that Global Markets no longer covers and getting introduction to those principles for possible wealth opportunity.

Kind regards,

Cynthia Rodriguez

<< OLE Object: Picture (Device Independent Bitmap) >>

Cynthia Rodriguez

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-----Original Appointment-----

From: Patrick Campion

Sent: Thursday, January 11, 2018 11:42 AM

To: Patrick Campion; Stewart Oldfield; Samantha Harmon; Dana Ponzio; Laura Farischon; Harris Winters; Nina-X Nevidzanska; Andrew King; Brian J Harrington; Charlie Burrows; Frank DeBenedittis; George Hack; Joshua Shoshan; Matt Glassman; Paul Bartilucci; Peter Ferrara; Sam Petrucci; Tazia Smith; Xavier Avila; Martin Zeman; Vahe Stepanian; Joshua Frank

Cc: Bradley Gillin; Cynthia Rodriguez

Subject: Account Planning-Stewart Oldfield [I]

When: Monday, January 22, 2018 8:00 AM-10:00 AM (UTC-05:00) Eastern Time (US & Canada).

Where: CR 2405 / Dial-in Attached

Classification: **For internal use only**

<< File: Oldfield 2018 Acct Planning.zip >>

Dear All,

As we begin 2018 Account Planning, please note that it is very important for the product groups to review the documents provided ahead of time and come to the meeting with ideas for potential new business in your particular product area. There is quite a bit of focus on this exercise this year.

Please make every effort to be in attendance. If you are absolutely unable, please delegate to someone who can represent you, or if there are multiple people from your product area, you can have one person represent all the accounts.

Documents that are available are attached.

Please contact Samantha Harmon if you have any questions or concerns.
