

Southern Financial Relationship New Accounts for 2017:

- 4 DB AG accounts
- 2 DBTCA accounts
- Total balance in 6 new accounts: **\$145,926,582.74** (majority in DB AG)

Kind regards,

Cynthia Rodriguez



Cynthia Rodriguez

Assistant Vice President

Deutsche Bank Trust Company Americas
Deutsche Bank Wealth Management

From: Stewart Oldfield

Sent: Tuesday, November 28, 2017 1:36 PM

To: Cynthia Rodriguez <[REDACTED]>

Subject: Third Lake acct/balance history [1]

Classification: **For internal use only**

Hey there. I'm trying to demonstrate the success we've had with Third Lake this year. I think the best way to do that is to show the following:

2016 peak assets

2016 assets withdrawn

2016 number of accounts closed (and any that were left open)

2016 ending assets

2017 starting assets (same as 2016 ending)

2017 number of new accounts opened

2017 number of new clients added (Nancy, family members we never knew, etc.)

2017 peak assets

2017 current assets

I will also highlight dialog with Paul, Robert, etc.

Not a huge rush on this. Starting to write my year-end review.

Thanks