

- I did not get a chance to do one for Deering/Crosby, but can send it first thing Monday.

I tried my best on these so feel free to edit and send back so that I can update the customer pages on DB Force. Thanks!

Kind regards,

Cynthia Rodriguez



Cynthia Rodriguez  
Assistant Vice President

Deutsche Bank Trust Company Americas  
Deutsche Bank Wealth Management

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**From:** Stewart Oldfield

**Sent:** Wednesday, January 03, 2018 6:18 PM

**To:** Bradley Gillin <[REDACTED]>; Cynthia Rodriguez <[REDACTED]>

**Subject:** FW: Account Planning sessions [C]

Fyi. Let's discuss tmw

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**From:** Samantha Harmon

**Sent:** Tuesday, January 02, 2018 5:31 PM

**To:** Stewart Oldfield <[REDACTED]>

**Subject:** Account Planning sessions [C]

Classification: **Confidential**

Hi Stew,

Below are your names for the account planning session that you had provided.

Please complete the attached template, which hopefully you will find is very much stream-lined.

I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done.

Would you be able to get back to me by Friday? If this isn't possible, let me know and let's see what we can figure out. We will also need to schedule the 90 minute session which we are trying to complete in January.

I'm here all week if you have any questions or need any help.

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Name  
Third Lake  
Elysium  
General Atlantic