

---

**From:** Cynthia Rodriguez [REDACTED]  
**Sent:** 1/22/2018 1:07:28 PM  
**To:** Patrick Campion [REDACTED]; Stewart Oldfield [REDACTED]; Samantha Harmon [REDACTED]; Dana Ponzio [REDACTED]; Laura Farischon [REDACTED]; Harris Winters [REDACTED]; Nina-X Nevidzanska [REDACTED]; Andrew King [REDACTED]; Brian J Harrington [REDACTED]; Charlie Burrows [REDACTED]; Frank DeBenedittis [REDACTED]; George Hack [REDACTED]; Joshua Shoshan [REDACTED]; Matt Glassman [REDACTED]; Paul Bartilucci [REDACTED]; Peter Ferrara [REDACTED]; Sam Petrucci [REDACTED]; Tazia Smith [REDACTED]; Xavier Avila [REDACTED]; Martin Zeman [REDACTED]; Vahe Stepanian [REDACTED]; Joshua Frank [REDACTED]  
**CC:** Bradley Gillin [REDACTED]  
**Subject:** RE: Account Planning-Stewart Oldfield [1]

Classification: **For internal use only**

All,

Below are the notes from today's account planning session. Please feel free to add on to the below. Thanks.

**Deering/Crosby:**

- Pitched structured notes in the past, but the client did not have interest
- Sell puts on a quarterly basis with DB collecting premium
- Stew Oldfield and Frank DeBenedittis to increase coverage and wallet sharing for this relationship
- Frank DeBenedittis to follow up and see what can be done from an RIA perspective

**Dzialga/General Atlantic:**

- Mark Dzialga KCP east adopted client
- General Atlantic focus is on semi-structured yielding
- There is more diversity on an individual level
- Stewart Oldfield to contact the clients for a relationship review and make introductions with Michael King
- Stewart Oldfield to attempt to get deposits and pitch Partner Capital Lines with Laura Farischon

**Elysium:**

- Major focus on private investments and structured lending
- Stewart Oldfield to take a look into the Leon and Debbie Black Foundation
- Stewart Oldfield to set up an investment meeting with KCP/PB/Lending

**Jockey Club:**

- Major opportunity to increase deposits with this relationship and open DB AG and CD accounts
- Brian Harrington, Frank DeBenedittis and Stewart Oldfield are currently working on investable opportunities within ISG

**Lindemann:**

- Adam Lindemann and George Lindemann Jr are the family members in which we maintain a relationship with
- Stewart Oldfield and Laura Farischon to take a look at Adam's balance sheet to see if there is a potential lending opportunity