

- George Jr, is in Commercial Real Estate and could be a possible candidate for refinancing (Global Markets) and potential SWAP
- Stewart Oldfield to follow with George on potential lending and SWAP.

**Safanad:**

- Stewart Oldfield to set up a meeting and introduce asset class specialists and Chris Partridge from aviation financing to the client
- There could be a global markets specialty real estate opportunity and investment/lever up for this relationship as well

**Southern Financial:**

- Mr. Epstein has the potential to introduce DB to other potential clients that are KCP adoptable
- Stewart Oldfield to follow up with the client on bringing in more deposits (DB AG)
- Josh Shoshan to increase trading with multiple accounts and KCP as a whole

**Thirdlake:**

- Currently interested in Tech views via structured notes, but no appetite for risk
- Investment in Harvest Hedge Fund makes sense for this relationship
- Stewart Oldfield and Paul Bartilucci to pitch DPM opportunities
- Stewart Oldfield to bring in more deposits and pitch consumer retail or corporate financing on this relationship

**Tisch:**

- Hedge Funds such as Harvest could be a possible opportunity for this relationship
- Stewart Oldfield to establish an introduction to Diamond Offshore Drilling with DB
- Stewart Oldfield and ISG to pitch RCM, corporate treasury assets, and possible DB AG accounts

**Possible Prospects:**

- Willet (Bloomberg Family Office):
- Small RCM portfolio with DB
- Look at private markets/managers
- Seed managers
- Patrick Campion to establish connection between John Cryan, Stewart Oldfield and Willet
- Internal groups such as ICG Sales, CIB, Prime Brokerage might have hedge fund contacts for Stew to connect to on a principle level
- 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

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