From:	Stewart Oldfield [redacted]
Sent:	1/19/2017 10:34:41 AM
To:	Andrew Gallivan [redacted]
BCC:	[redacted]
Subject:	account planning [C]

Classification: **Confidential**

Client	ISG/DPM	Lending	Wealth Planning	Notes
Elysium (Leon Black)	Dursi/King	Farischon		
Orix		GM		
only		Included in July planning		
Southern Financial (Epstein)				Included
in November planning				
Third Lake	Dursi/King			
54 Madison		GM only		
Tisch	Dursi/King			
Shamrock				
Safanad				
Crestline		GM only		
Cliff Illig				

Week of Jan. 30th is pretty open for these discussions.

Thanks

From: Andrew Gallivan
Sent: Tuesday, January 17, 2017 8:35 AM
To: Mary A Coleman; Brian P Convey; Joanne Jensen; Stewart Oldfield; Elizabeth Payne; Joseph Sabbagh; Terri Sohrab; Terrence F Tangney; Rosemary Vrablic
Cc: Mamie Holland
Subject: [C]

Classification: **Confidential**

As you've heard Patrick say in previous meetings, our goal is to have a plan for the majority of our clients and important prospects by 3/31/17. Thoughtful client planning, with full participation from your product partners, will identify the growth opportunities for 2017. Thereafter it will be up to you and your product partners to execute against those opportunities with urgency so that we can achieve momentum early in the year. It's important.

These sessions will be different than what you may have experienced in the past. The focus will be on the experience during the sessions and the outcomes. Here is what you can expect:

<u>**Preparation for the sessions:**</u>

- Let's discuss 10 of your clients for this first round of planning sessions. These should be your top 10 clients/prospects for revenue growth in 2017. They <u>may not</u> be your existing largest clients.

- By Monday January 23rd, please send me the names of the <u>top 10 clients/prospects in your portfolio for growth</u> potential in 2017. In addition, please include any clients who were previously part of the top 100 client planning exercise.