
From: Cynthia Rodriguez [REDACTED]
Sent: 1/8/2018 12:04:54 PM
To: Stewart Oldfield [REDACTED]; Bradley Gillin [REDACTED]
Subject: RE: Account Planning sessions [C] [I]
Attachments: 2018 Account Planning - GA.docx; 2018 Account Planning - Deering.Crosby.docx

Classification: **For internal use only**

Hi,

Attached are the final two. Please give them your blessing or make whatever changes needed and I will send it all to Samantha. I have saved the ones you've completed so far and will update DB Force to make sure the product people are added. If I can't add the KCP contacts, I will have Samantha do it on her end. Let me know if you need anything else. Thanks.

Kind regards,

Cynthia Rodriguez



Cynthia Rodriguez
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[REDACTED]

From: Stewart Oldfield
Sent: Saturday, January 06, 2018 10:25 PM
To: Cynthia Rodriguez <cynthia.rodriquez@db.com>; Bradley Gillin <[REDACTED]>
Subject: RE: Account Planning sessions [C] [I]

Awesome, thanks again. I've updated the ones you sent. Please have a look for any obvious mistakes or areas where the client team I've listed differs from what is in DB Force. Some of the people you listed in the forms aren't the people I expected, so maybe we have to clean that up in the system.

Safanad is fine as is, Ali should be totally separate going forward.

GA – yes, we are talking about Madison Park, which is the partners' capital vehicle

Tisch – let's discuss. I know less about the history than you do. Does it really go back to 1976? I also go back to 1976 . . .

I've done the opportunity/challenge write ups for GA and Deering below, so you just need to do the client overview. We can wrap that up first thing Monday hopefully.

GA/Madison Park

We have substantial opportunity to pursue with this account. The partners control a lot of capital and are financially sophisticated. They are willing to look at any interesting transaction. While this is an opportunity, it is also a challenge