
From: Cynthia Rodriguez [REDACTED]
Sent: 1/5/2018 5:59:43 PM
To: Stewart Oldfield [REDACTED]; Bradley Gillin [REDACTED]
Subject: RE: Account Planning sessions [C] [I]
Attachments: 2018 Account Planning - Oldfield.zip

Classification: **For internal use only**

Hi,

Attached are the account planning pages for the below clients. A few notes:

- I did not create one for General Atlantic because I wasn't exactly sure if it was General Atlantic you wanted to include or Madison Park Capital LLC. Also,
- I see that Ali Rashid is under the Safand relationship, but I have a completely different profile for Safand as a company.
- Left a few blanks for Tisch's if you can fill it in
- 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
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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

From: Samantha Harmon
Sent: Tuesday, January 02, 2018 5:31 PM
To: Stewart Oldfield [REDACTED]
Subject: Account Planning sessions [C]