

Cc: Julia-C Vetter <[REDACTED]>

Subject: Our Data Integrity---Total Wealth of our Clients [!]

Classification: **For internal use only**

Team,

As Fabrizio mentioned at the last town hall, we are now focused on the growth stage of our business. One element of growth is an understanding of where you're starting from. Consequently, we need your help with a brief data enhancement exercise so that we can better know the wealth of our clients and prospects. This simple data element is either absent or very old in DbForce. This information will help us better understand if we have the right products and services for the clients and prospects we currently have.

For most of you, this task will take only 30 minutes or less of your time. SCM (Ashok Eastman, Daniel Eisenberg and Henry Clark) will support you with the task so that you won't have to input any information into dbForce. They will reach out to you shortly with details.

This exercise will also help prepare us for the dbForce system update in the near future. If you have any questions or concerns, please talk to Ashok, Dan or Henry. They can help.

Our goal is to have this data clean up completed by August 17.

Thanks for your helping out with this important task.

Kind regards,  
Patrick Champion



**Patrick Champion**  
Managing Director | Head of Wealth Management Americas

Deutsche Bank Trust Company Americas  
Wealth Management - Americas  
345 Park Avenue, 10154-0004 New York, NY, USA  
Tel. [REDACTED]  
Mobile [REDACTED]  
Email [REDACTED]

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