

B. Separately, evaluate whether there are any revenue enhancement opportunities for clients you cover that are in the attached list

For all clients identified in A and all clients in list B, please complete the attached account planning template. The responses will be aggregated in to a single database for discussion at the workshop. An illustrative example of a completed account planning template and system generated financials for clients in list B have been included for reference.

Please provide your responses / completed templates to [REDACTED] by close of business on Wednesday, July 20.

Thank you for your focus on this and apologize for the short time frame

Andrew



Andrew Gallivan
Acting Co-Head WM - Americas

Deutsche Bank Trust Company Americas
Global Products & Solutions
345 Park Avenue, 10154-0004 New York, NY, USA

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