
From: Stewart Oldfield [REDACTED]
Sent: 1/4/2018 7:08:33 AM
To: Cynthia Rodriguez [REDACTED]
CC: Bradley Gillin [REDACTED]
Subject: Re: Account Planning sessions [C]

Sweet. I will try to get some of this done today. Will be fighting with Mary for the laptop.

Stewart Oldfield, CFA, CAIA
Director

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

Securities offered through Deutsche Bank Securities Inc.

On Jan 4, 2018, at 6:42 AM, Cynthia Rodriguez <[REDACTED]> wrote:

Luckily I started this for you earlier in the year. I believe we didn't know which other banks these guys used and what other deals they're currently doing with other institutions.

Sent with BlackBerry Work
(www.blackberry.com)

From: Stewart Oldfield <[REDACTED]>
Date: Wednesday, Jan 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]

Classification: **Confidential**

Hi Stew,

Below are your names for the account planning session that you had provided. Please complete the attached template, which hopefully you will find is very much stream-lined. I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done. Would you be able to get back to me by Friday? If this isn't possible, let me know and let's see what we can figure out. We will also need to schedule the 90 minute session which we are trying to complete in January.