
From: Stewart Oldfield [stewart.oldfield@db.com]
Sent: 8/21/2017 4:47:52 PM
To: Samantha Harmon [Samantha.Harmon@db.com]
Subject: FW: account planning [C]

From: Stewart Oldfield
Sent: Thursday, January 19, 2017 10:35 AM
To: Andrew Gallivan <andrew.gallivan@db.com>
Subject: account planning [C]

Classification: **Confidential**

Client	ISG/DPM	Lending	Wealth Planning	Notes
Elysium (Leon Black) Orix only	Dursi/King	Farischon GM Included in July planning		
Southern Financial (Epstein) in November planning				Included
Third Lake 54 Madison Tisch Shamrock Safanad Crestline Cliff Illig	Dursi/King Dursi/King	GM only		

Week of Jan. 30th is pretty open for these discussions.

Thanks

From: Andrew Gallivan
Sent: Tuesday, January 17, 2017 8:35 AM
To: Mary A Coleman; Brian P Convey; Joanne Jensen; Stewart Oldfield; Elizabeth Payne; Joseph Sabbagh; Terri Sohrab; Terrence F Tangney; Rosemary Vrablic
Cc: Mamie Holland
Subject: [C]

Classification: **Confidential**

As you've heard Patrick say in previous meetings, our goal is to have a plan for the majority of our clients and important prospects by 3/31/17. Thoughtful client planning, with full participation from your product partners, will identify the growth opportunities for 2017. Thereafter it will be up to you and your product partners to execute against those opportunities with urgency so that we can achieve momentum early in the year. It's important.

These sessions will be different than what you may have experienced in the past. The focus will be on the experience during the sessions and the outcomes. Here is what you can expect:

Preparation for the sessions: