
From: Cynthia Rodriguez [REDACTED]
Sent: 1/20/2017 1:34:06 PM
To: Stewart Oldfield [REDACTED]
Subject: RE: account planning [C]

Hey,

So I left the print outs of the ones I completed so far, but I'm missing details. I figured we could go over it when you have time today or next week. Below is what I'm missing for your list as a heads up:

54 Madison Partners/ Orix/Safanad:

- Contact names, numbers emails etc
- The company's plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

Elysium/Shamrock/Crestline:

- Contact names, numbers emails etc
- Source of wealth details
- The company names and plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

TFMG, LLC (Tisch)

- Contact names, numbers emails etc
- The company's plan to grow their wealth
- Financial liquidity and plans for next 3-12 months
- Client's relationship with DB competitors broken down by product type

Kind regards,

Cynthia Rodriguez



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From: Stewart Oldfield
Sent: Thursday, January 19, 2017 10:35 AM