

To: Andrew Gallivan
Subject: account planning [C]

Classification: **Confidential**

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

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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:

- Let's discuss 10 of your clients for this first round of planning sessions. These should be your top 10 clients/prospects for revenue growth in 2017. They may not be your existing largest clients.
- By Monday January 23rd, please send me the names of the top 10 clients/prospects in your portfolio for growth potential in 2017. In addition, please include any clients who were previously part of the top 100 client planning exercise.
- By Monday January 23rd, please send me the names of the ISG/DPM partner, lending specialists and wealth planning specialists aligned to those relationships identified. I'll want to communicate with them directly about their role in the planning sessions.