

# 2018 Account Planning

## RM contribution

**Relationship Name: Dzialga**  
**Banker Team: Stewart Oldfield**  
**GCIS Number: [REDACTED]**

### **Relationship Team:**

**ISG: Andrew King**

**DPM: Paul Bartilucci**

**KCP: Tazia Smith**

**Lending: Laura Farischon**

**Trust/Custody:**

**WPS: Sam Petrucci**

**Deposits: Charlie Burrows**

**Other:**

### **Client Profile**

Mark Dzialga serves as Co-Chairman of General Atlantic's Investment Committee, managing all of the firm's global investment activities. He also serves on the firm's Executive Committee. Mark was instrumental in building out GA's Business Services and Healthcare sectors, developing global strategy and insight for each and leading numerous GA investments including Genpact, Schaller Anderson and Emdeon. Mark is currently a director of Aimbridge Hospitality, Citco, CLEAResult, Mu Sigma, EN Engineering, and GIS, and has been a director of public and private GA investments including Genpact, Emdeon, Exult, Daksh, Talus, MultiPlan, UPromise, Schaller Anderson, Network Solutions and Webloyalty.

Before joining GA in 1998, Mark was co-head of the High Technology Merger Group at Goldman Sachs, where he advised many of the firm's technology clients on mergers, acquisitions and restructurings. Mark holds a B.S. degree from Canisius College and an M.B.A. from the Columbia Business School. He serves on the Columbia Business School Board of Overseers as well as the Board of Trustees for the Brunswick School in Greenwich, Connecticut.

This relationship was established by Tazia Smith and Paul Morris in June 2014 when Dzialga bought a small CLO position from DB. Tazia and Paul covered the partner's capital/family office team within General Atlantic which is how they met Mark and his Kirsten. We haven't executed any follow on business and the client's primary banking relationship seems to be with JPM. The primary contact for this relationship is Kirsten Dzialga. Estimated client net worth is \$100mm.

### **Opportunities and Challenges**

Based on the clients' net worth and financial sophistication, there must be more we can do with them. While they bought a small CLO position in 2014, they haven't engaged with KCP on other products. For this reason, we think they are better suited to be covered by ISG for broader investment ideas. And given KCP's

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