

2018 Account Planning

RM contribution

Relationship Name: Deering/Crosby

Banker Team: Stewart Oldfield

GCIS Number: [REDACTED]

Relationship Team:

ISG: Frank DeBenedittis

Trust/Custody: National Trust team

DPM:

WPS: Sam Petrucci

KCP:

Deposits: Stewart Oldfield

Lending: George Hack

Other:

Client Profile

The Deering/Crosby relationship has been with DB WM since April 2016, and primarily holds a brokerage relationship with the bank. This relationship was previously managed by former banker, Michael Mullin, and has recently been managed by Stewart Oldfield since November 2017. The account was managed by PCS for a long time before being moved to WM at the time of the Alex.Brown sale to Raymond James.

The primary contact for this relationship is Heather Deering Crosby, daughter of recently deceased Anthony Deering.

Mr. Anthony W. Deering, also known as Tony, served as the President of Mercantile-Safe Deposit and Trust Company. Mr. Deering was an outstanding Business Leader and led The Rouse Company to become one of the country's largest commercial real estate developers. He has a wealth of financial services and investment management experience. From 1997 to 2004, he served as the Chairman and Chief Executive Officer of The Rouse Company. Deering spent most of his career at the Rouse Company, which he first joined in 1972 and, as chairman and CEO from 1997 to 2004, helped grow into one of the nation's largest commercial real estate developers. Under his leadership, the Rouse Company operated with a philosophy that improving the quality of life in the communities it developed was an essential part of doing business. In that spirit, when the company was sold in 2004, Deering designated \$25 million to the Rouse Company Foundation, quadrupling the charity in size and enabling its ongoing support of local housing and job training initiatives.

Mr. Deering was also a Member of Advisory Board of Deutsche Bank North America from 2004 until November 2017. He was Member of Client Advisory Board at Deutsche Bank Trust Company Americas from January 25, 2007 until November 17, 2017. He served as a Member of Americas Advisory Board at Deutsche Bank AG and Deutsche Bank Americas Regional Client Advisory Board. He served as an Independent Director of Under Armour, Inc. since August 2008 until November 17, 2017. He served as an Independent Director of T. Rowe Price Summit Funds, Inc. - T. Rowe Price Summit GNMA Fund and T. Rowe Price International Funds, Inc. - T. Rowe Price Global Infrastructure Fund. He served on the Boards of a number of private companies

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