

**From:** Stewart Oldfield [REDACTED]  
**Sent:** 3/25/2019 11:46:16 AM  
**To:** Sarah Rafferty [REDACTED]  
**Subject:** RE: Frieze invite for Preview [I]

Classification: **For internal use only**

Is there a way to align the text and invite to the left of an email? Looks strange if I want to write them a note above the invite language.

Thanks

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**From:** Sarah Rafferty  
**Sent:** Wednesday, March 20, 2019 1:15 PM  
**To:** Stewart Oldfield <[REDACTED]>  
**Subject:** Frieze invite for Preview [I]

Classification: **For internal use only**

Hi Stewart, Attached is the invite for the Frieze Preview for you to send to your approved nominees listed below. Please double-click on the attachment and it will open into a new email to send direct – no pasting or forwarding needed. The invite is not yet available for the reception – should have it by next week. In the meantime, if you want to send this one and add a comment about the celebration reception on the evening of Tuesday, April 30, please feel free.

Please note, we are following the same process as last year – as long as your invitees meet the criteria outlined below, you may extend the invitation without securing pre-approval in the compliance system. If the client accepts, you will then be required to log in to Compliance using ID 6C73 in the amount of \$430 pp for the Reception and Preview and ID 6C77 in the amount of \$230 for the Preview ticket. Feel free to click on the registration link yourself so you see what your client is receiving – all details on the Fair, our lounge, etc. If you have any questions, just let me know. Thanks.

**Criteria:**

- Invitees should be limited to the wealth management client (or prospect) and/or their family members
- No sensitive counterparts (including public officials, regulatory agencies, etc.)
- DB payment of client travel & accommodation is not permitted
- Pending business at the time of invite is not permitted (i.e. specific discussions pertaining to investment type and amount have occurred and decision or action is pending with client, or discussion on moving assets from bank x to DB).
- Prospective business is ok – general relationship building.

If your list below meets the above criteria, you may extend the invitation for them to join us on one day during the Fair. If you have any questions or concerns regarding the above criteria, please contact [abc.jax@db.com](mailto:abc.jax@db.com) directly. Thanks.

Also, please note we have a few groups coming in to the Lounge:

Intermediaries/COI on Thursday from 4-7pm hosted by Sam Petrucci and Jacqui Valouch  
NextGen on Friday – will have lunch and roundtable discussion starting with lunch at 345 Park followed by a trip to the Fair

Keep this in mind if any of these fall into your current list. Invites for these events will be available by early next week.

Last thing to note is – to avoid potential conflicts with the PCS protected list, please check the names in DB Force. Thanks.

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Region	Ticket type	# of tickets required	Invitee first name	Invitee last name	Invitee company name	Invitee job title	DB nominator / contact
US - New York	Wed. Preview	2	Rudy	Sahay	54 Madison	CEO	Stewart Oldfield