

Subject: FW: Account Planning-Stewart Oldfield [I]
From: Cynthia Rodriguez <[REDACTED]>
Date: Mon, 22 Jan 2018 13:53:10 -0500
To: Samantha Harmon <[REDACTED]>

Classification: For internal use only

Hey there,

All the tasks have been tagged with "2018AP" and assigned to respective people. Let me know if anything else needs to be done. Thanks for helping J

Kind regards,

Cynthia Rodriguez

Cynthia Rodriguez
Assistant Vice President

Deutsche Bank Trust Company Americas
Deutsche Bank Wealth Management
345 Park Avenue, 24th Fl 10154-0004 New York, NY, USA
Tel. [REDACTED]
Fax [REDACTED]
Email [REDACTED]

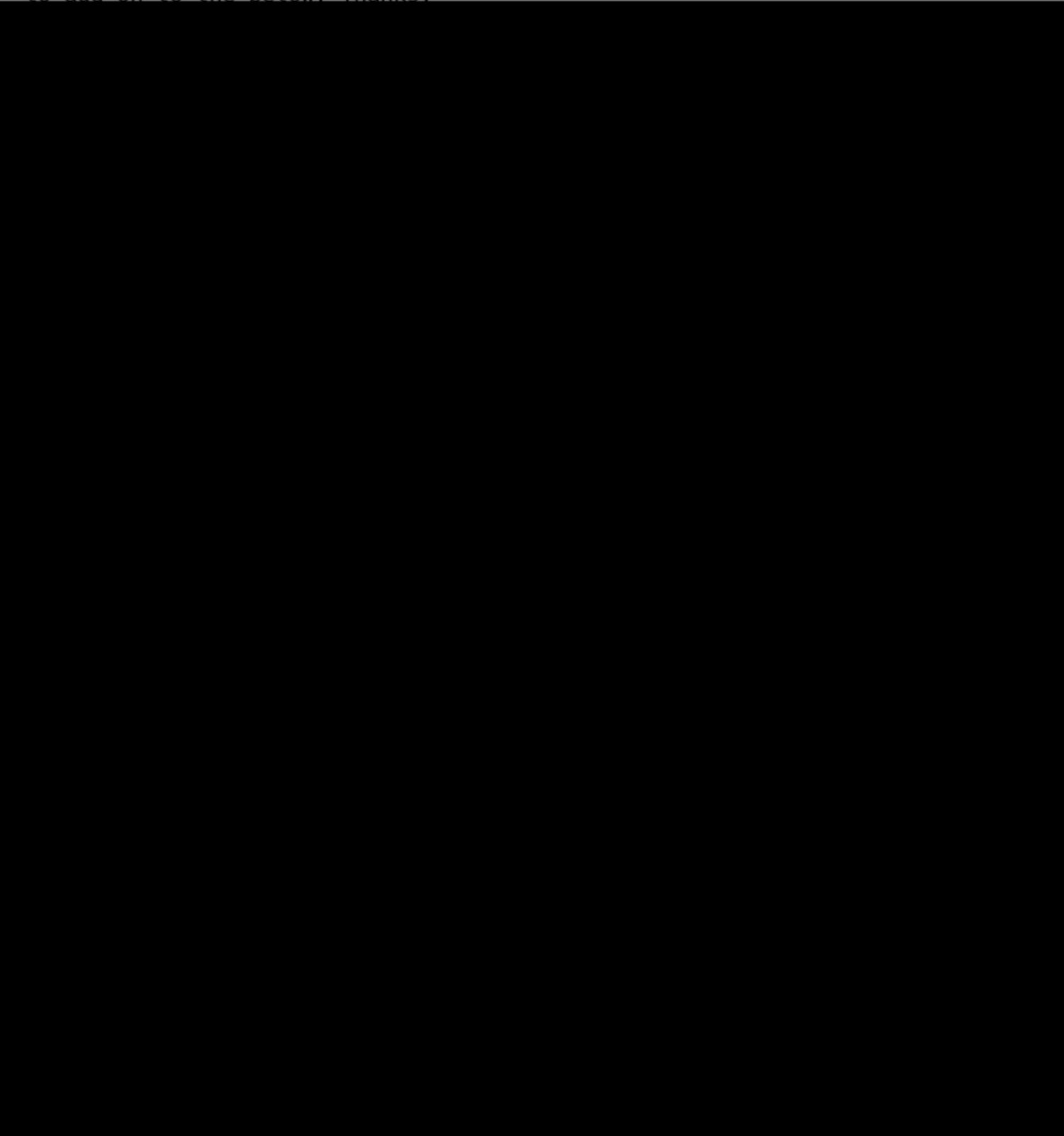
From: Cynthia Rodriguez
Sent: Monday, January 22, 2018 1:07 PM
To: Patrick Campion <[REDACTED]>; Stewart Oldfield <[REDACTED]>; Samantha Harmon <[REDACTED]>; Dana Ponzio <[REDACTED]>; Laura Farischon <[REDACTED]>; Harris Winters <[REDACTED]>; Nina-X Nevidzanska <[REDACTED]>; Andrew King <[REDACTED]>; Brian J Harrington <[REDACTED]>; Charlie Burrows <[REDACTED]>; Frank DeBenedittis <[REDACTED]>; George Hack <[REDACTED]>; Joshua Shoshan <[REDACTED]>; Matt Glassman <[REDACTED]>; Paul Bartilucci <[REDACTED]>; Peter Ferrara <[REDACTED]>; Sam Petrucci <[REDACTED]>; Tazia Smith <[REDACTED]>; Xavier Avila <[REDACTED]>; Martin Zeman <[REDACTED]>; Vahe Stepanian <[REDACTED]>; Joshua Frank <[REDACTED]>

Cc: Bradley Gillin <[REDACTED]>
Subject: RE: Account Planning-Stewart Oldfield [I]

Classification: For internal use only

All,

Below are the notes from today's account planning session. Please feel free to add on to the below. Thanks.



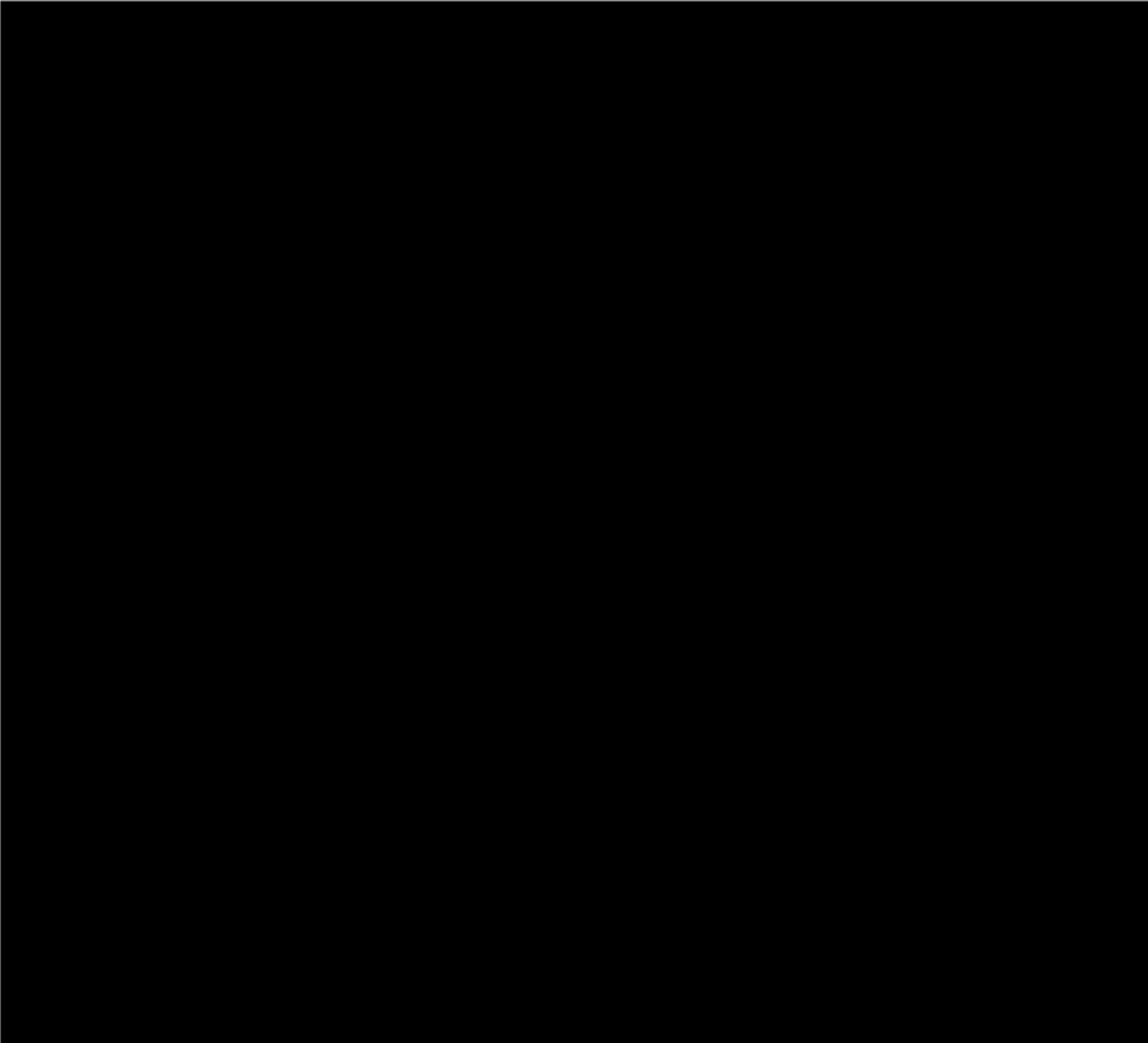


Southern Financial:

Mr. Epstein has the potential to introduce DB to other potential clients that are KCP adoptable

Stewart Oldfield to follow up with the client on bringing in more deposits (DB AG)

Josh Shoshan to increase trading with multiple accounts and KCP as a whole



Kind regards,

Cynthia Rodriguez

Cynthia Rodriguez
Assistant Vice President

Deutsche Bank Trust Company Americas
Deutsche Bank Wealth Management
345 Park Avenue, 24th Fl 10154-0004 New York, NY, USA
Tel. [REDACTED]
Fax [REDACTED]
Email [REDACTED]

-----Original Appointment-----

From: Patrick Campion

Sent: Thursday, January 11, 2018 11:42 AM

To: Patrick Campion; Stewart Oldfield; Samantha Harmon; Dana Ponzio; Laura Farischon; Harris Winters; Nina-X Nevidzanska; Andrew King; Brian J Harrington; Charlie Burrows; Frank DeBenedittis; George Hack; Joshua Shoshan; Matt Glassman; Paul Bartilucci; Peter Ferrara; Sam Petrucci; Tazia Smith; Xavier Avila; Martin Zeman; Vahe Stepanian; Joshua Frank

Cc: Bradley Gillin; Cynthia Rodriguez

Subject: Account Planning-Stewart Oldfield [I]

When: Monday, January 22, 2018 8:00 AM-10:00 AM (UTC-05:00) Eastern Time (US & Canada).

Where: CR 2405 / Dial-in Attached

Classification: For internal use only
<< File: Oldfield 2018 Acct Planning.zip >>
Dear All,

As we begin 2018 Account Planning, please note that it is very important for the product groups to review the documents provided ahead of time and come to the meeting with ideas for potential new business in your particular product area. There is quite a bit of focus on this exercise this year.

Please make every effort to be in attendance. If you are absolutely unable, please delegate to someone who can represent you, or if there are multiple

people from your product area, you can have one person represent all the accounts.

Documents that are available are attached.

Please contact Samantha Harmon if you have any questions or concerns.

Patrick Champion's Virtual Meeting Room Details

United States [redacted]
Virtual Meeting Room number: [redacted]

HOST PIN: [redacted]
Participant PIN: [redacted]

Internal Phone and VC Devices
Virtual Meeting Room number: [redacted]

Desktop Video or External Video
Virtual Meeting Room address: [redacted]
<mailto:[redacted]>

External Audio Participants:
Choose country location below for dial in
Then enter number [redacted]

Major Hubs:
Australia [redacted]
China [redacted]
Germany [redacted]
Hong Kong [redacted]
India [redacted]
regulatory reasons) (In progress; delayed due to
Singapore [redacted]
United Kingdom [redacted]
United States [redacted]

Rest of the world:
Austria:
Belgium
Canada
Cayman Islands
Channel Islands
France
Hungary
Indonesia
Ireland
Israel
Italy
Japan [redacted]

Malaysia
Mauritius
Mexico
Netherlands
New Zealand
Philippines
Poland
Portugal
Romania
Russian Federation
Saudi Arabia
South Africa
South Korea
Spain
Sweden
Taiwan
Thailand
United Arab Emirates
Vietnam

