

Cynthia Rodriguez
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Deutsche Bank Wealth Management
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From: Bella Klein [mailto:]
Sent: Friday, February 02, 2018 12:49 PM
To: Cynthia Rodriguez < >
Subject: Re: 2017 Caterpillar Trust - JE As Grantor to DW and LG as Trustees
of The 2017 Caterpillar Trust January 3 2017

I believe that you have all documents, please confirm when account will be opened.

Thank you,
Bella

Tel:

On Feb 2, 2018, at 11:52 AM, Cynthia Rodriguez < >
wrote:

Hi Bella,

We will need the following information:

2017 Caterpillar Trust:

Tax ID

- 0 Address
- 0 Date of Incorporation
- 0 Trust Agreement

For Grantor/Trustee/Beneficiaries:

- 0 Name
- 0 Address
- 0 Date of Birth
- 0 Social Security Number
- 0 Employment Information (name of employer, address etc)
- 0 Photo ID

Please confirm which account will fund this new trust. Feel free to reach out if you have any questions. Thanks!

Kind regards,
Cynthia Rodriguez
