

2018 Account Planning
Financials
Relationship Name
Banker Team
1. CRM
Rel. ID Number
THIRD LAKE CAPITAL
Team New York12
Stewart Oldfield
dbForce Date
Relationship Net Worth
Relationship Investable Assets
Relationship Classification
Source of Wealth
Description of Wealth/Entity Assets
>\$500 M
\$100 - 500 M
Tier 3
Breath of Client Needs (# products) 1 - 2
Revenue Potential (\$m p.a.)
0
Investment; Inheritance / Gifts
Karen's source of wealth is her husband Todd Wanek, CEO of Ashley Furniture (see his wealth profile)
Relationship Segment
Relationship Segment Description
Industry Group
Industry
Entrepreneur
Entertainment
Media & Telecom
0
Forbes 400 Ranking (as of Nov 2017) / Public Records
Forbes 400 Rank
0
Net Worth
0 \$bn
Financials in USD
Revenues YTD
Nov-17
Lending Other Structured
Lending Mortgages
Lending Lombard
Lending Structured Solutions
Total Lending
Deposits
L&D Central Mgt
Total L&D
Capital Markets
DPM
Custody only
Wealth Planning Solutions
Fund Solutions
WAM
Other
Total GPS
Partnerships
Total
0
0
0
0
565,351
0
565,351
0
0
0
0
0
0
0
0
0
0
0
0
0
565,351
Nov-16
0
0
0
0

0
425,090
0
425,090
0
0
0
0
0
0
0
0
0
425,090
81,670,782
179
81,670,604
(107,039,083)
0
0
Nov-17
0
0
0
0
81,670,782
81,670,782
0
0
0
0
0
0
CBV
Nov-16
0
0
0
0
179
179
0
0
0
0
0
0
Nov-17
NNA YTD
Nov-16
Nov-17
NNL YTD
Nov-16
Financial Ranking (by all Relationships in GMT Americas)
Revenue Rank
106
CBV Rank
119
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