

2018 Account Planning  
Financials  
Relationship Name  
Banker Team  
1. CRM  
Rel. ID Number  
LINDEMANN JR GEORGE  
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  
\$50 - 100 M  
Tier 1  
Breath of Client Needs (# products) 1 - 2  
Revenue Potential (\$m p.a.)  
0  
\$100 - 250K  
0  
Relationship Segment  
Relationship Segment Description  
Industry Group  
Industry  
Real Estate  
0  
Other  
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  
168  
0

168  
0  
0  
0  
0  
0  
0  
0  
0  
0  
0  
168  
Nov-16  
0  
0  
0  
0  
0  
221  
0  
221  
1,000  
0  
0  
0  
0  
0  
0  
1,000  
0  
1,221  
Nov-17  
0  
0  
0  
0  
56,563  
56,563  
1,053,000  
0  
0  
0  
0  
1,053,000  
1,109,563  
CBV  
Nov-16  
0  
0  
0  
0  
55,809  
55,809  
1,106,950  
0  
0  
0  
0  
0  
1,106,950  
1,162,759  
754  
165,080  
0

0  
Nov-17  
NNA YTD  
Nov-16  
Nov-17  
NNL YTD  
Nov-16  
Financial Ranking (by all Relationships in GMT Americas)  
Revenue Rank  
4,358  
CBV Rank  
1,892  
Strictly Confidential