

2018 Account Planning
Financials
Relationship Name
Banker Team
1. CRM
Rel. ID Number
GENERAL ATLANTIC FA
Team New York12
Stewart Oldfield
dbForce Date
Relationship Net Worth
Relationship Investable Assets
Relationship Classification
Source of Wealth
Description of Wealth/Entity Assets
\$25 - 50 M
\$10 - 25 M
Tier 2
Breath of Client Needs (# products) 1 - 2
Revenue Potential (\$m p.a.)
0
\$50 - 100K
0
Relationship Segment
Relationship Segment Description
Industry Group
Industry
Entrepreneur
0
0
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
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
4,976
CBV Rank
1,323
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