2018 Account Planning
Financials
Relationship Name
Banker Team
1. CRM
Rel. ID Number
ELYSIUM MANAGEMENT
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
$100 - 500 M
Tier 2
Breath of Client Needs (# products) 1 - 2
Revenue Potential ($m p.a.)
>$500K
Salary / Earnings; Investment; Business Owner
Mr. Black is the Chairman of the Board, Chief Executive Officer and a Director of Apollo Global Mana
gement, LLC and a Managing Partner of Apollo Management, L.P. which he
founded in 1990. From 1977 to 1990, Mr. Black worked at Drexel Burnham Lambert Incorporated, where h
e served as Managing Director, head of the Mergers & Acquisitions
Group and co-head of the Corporate Finance Department.
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
Parterships
Total
0
0
0
0
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0
Nov-16

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0
0
Nov-17
0
0
0
0
81,980
81,980
171,850
0
0
0
0
171,850
253,830
CBV
Nov-16
0
0
0
0
79,520
79,520
110,520
0
0
0
0
0
110,520
190,040
22,810
2,230
0
0
Nov-17
NNA YTD
Nov-16
Nov-17
NNL YTD
Nov-16
Financial Ranking (by all Relationships in GMT Americas)
Revenue Rank
4,987
CBV Rank
2,514
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