

2018 Account Planning
Financials
Relationship Name
Banker Team
1. CRM
Rel. ID Number
DEERING/CROSBY
Team New York12
Stewart Oldfield
dbForce Date
Relationship Net Worth
Relationship Investable Assets
Relationship Classification
Source of Wealth
Description of Wealth/Entity Assets
\$100 - 500 M
\$50 - 100 M
Tier 2
Breath of Client Needs (# products) 0
Revenue Potential (\$m p.a.)
0
\$50 - 100K
0
Relationship Segment
Relationship Segment Description
Industry Group
Industry
0
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
(13,661)
0
(693)
(14,353)
861
0

(13,493)
3,332
0
0
0
1,597
0
(6,863)
(1,935)
0
(15,427)
Nov-16
0
0
35,289
0
35,289
11,916
0
47,204
1,715
0
4
0
8,730
0
5,570
16,020
0
63,225
8,437,449
56,022,947
0
48,987,568
0
0
105,010,515
113,447,964
22,449,398
43,638,028
0
0
42,380,459
0
0
86,018,486
108,467,884
(6,661,369)
59,008,559
0
0
Nov-17
0
0
8,271,509
8,271,509
165,940
CBV
Nov-16
0
17,689,454
0
17,689,454

4,759,944

Nov-17

NNA YTD

Nov-16

Nov-17

NNL YTD

Nov-16

Financial Ranking (by all Relationships in GMT Americas)

Revenue Rank

6,545

CBV Rank

79

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