

Subject: FW: Account Planning-Stewart Oldfield [I]  
From: Sam Petrucci [REDACTED]  
Date: Fri, 26 Jan 2018 17:29:19 -0500  
To: Stewart Oldfield [REDACTED]

Classification: For internal use only

Hey bud, please let me know where I (or a member of my team) can help here.  
Have a great weekend ... Sam

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From: Cynthia Rodriguez  
Sent: Monday, January 22, 2018 1:07 PM  
To: Patrick Campion <[REDACTED]>; Stewart Oldfield  
<[REDACTED]>; Samantha Harmon <[REDACTED]>; Dana  
Ponzio <[REDACTED]>; Laura Farischo <[REDACTED]>;  
Harris Winters <[REDACTED]>; Nina-X Nevidzanska <[REDACTED]>;  
<[REDACTED]>; Andrew King <[REDACTED]>; Brian J Harrington  
<[REDACTED]>; Charlie Burrows <[REDACTED]>; Frank  
DeBenedittis <[REDACTED]>; George Hack <[REDACTED]>;  
Joshua Shoshan <[REDACTED]>; Matt Glassman  
<[REDACTED]>; Paul Bartilucci <[REDACTED]>; Peter  
Ferrara <[REDACTED]>; Sam Petrucci <[REDACTED]>; Tazia  
Smith <[REDACTED]>; Xavier Avila <[REDACTED]>; Martin Zeman  
<[REDACTED]>; Vahe Stepanian <[REDACTED]>; Joshua Frank  
<[REDACTED]>  
Cc: Bradley Gillin <[REDACTED]>  
Subject: RE: Account Planning-Stewart Oldfield [I]

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All,

Below are the notes from today's account planning session. Please feel free  
to add on to the below. Thanks.

Deering/Crosby:

Pitched structured notes in the past, but the client did not have interest  
Sell puts on a quarterly basis with DB collecting premium  
Stew Oldfield and Frank DeBenedittis to increase coverage and wallet sharing  
for this relationship  
Frank DeBenedittis to follow up and see what can be done from an RIA  
perspective

Dzialga/General Atlantic:

Mark Dzialga KCP east adopted client

General Atlantic focus is on semi-structured yielding  
There is more diversity on an individual level  
Stewart Oldfield to contact the clients for a relationship review and make introductions with Michael King  
Stewart Oldfield to attempt to get deposits and pitch Partner Capital Lines with Laura Farischon

Elysium:

Major focus on private investments and structured lending  
Stewart Oldfield to take a look into the Leon and Debbie Black Foundation  
Stewart Oldfield to set up an investment meeting with KCP/PB/Lending

Jockey Club:

Major opportunity to increase deposits with this relationship and open DB AG and CD accounts  
Brian Harrington, Frank DeBenedittis and Stewart Oldfield are currently working on investable opportunities within ISG

Lindemann:

Adam Lindemann and George Lindemann Jr are the family members in which we maintain a relationship with  
Stewart Oldfield and Laura Farischon to take a look at Adam's balance sheet to see if there is a potential lending opportunity  
George Jr, is in Commercial Real Estate and could be a possible candidate for refinancing (Global Markets) and potential SWAP  
Stewart Oldfield to follow with George on potential lending and SWAP.

Safanad:

Stewart Oldfield to set up a meeting and introduce asset class specialists and Chris Partridge from aviation financing to the client  
There could be a global markets specialty real estate opportunity and investment/lever up for this relationship as well

Southern Financial:

Mr. Epstein has the potential to introduce DB to other potential clients that are KCP adoptable  
Stewart Oldfield to follow up with the client on bringing in more deposits (DB AG)  
Josh Shoshan to increase trading with multiple accounts and KCP as a whole

Thirdlake:

Currently interested in Tech views via structured notes, but no appetite for risk  
Investment in Harvest Hedge Fund makes sense for this relationship  
Stewart Oldfield and Paul Bartilucci to pitch DPM opportunities

Stewart Oldfield to bring in more deposits and pitch consumer retail or corporate financing on this relationship

Tisch:

Hedge Funds such as Harvest could be a possible opportunity for this relationship

Stewart Oldfield to establish an introduction to Diamond Offshore Drilling with DB

Stewart Oldfield and ISG to pitch RCM, corporate treasury assets, and possible DB AG accounts

Possible Prospects:

Willet (Bloomberg Family Office):

Small RCM portfolio with DB

Look at private markets/managers

Seed managers

Patrick Campion to establish connection between John Cryan, Stewart Oldfield and Willet

Internal groups such as ICG Sales, CIB, Prime Brokerage might have hedge fund contacts for Stew to connect to on a principle level

Laura Farischon pitched the notion of looking on the PE & Hedge Fund public list to see if there are any possible prospects there

Another option that was pitched was covering hedge funds that Global Markets no longer covers and getting introduction to those principles for possible wealth opportunity.

Kind regards,

Cynthia Rodriguez

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Cynthia Rodriguez  
Assistant Vice President

Deutsche Bank Trust Company Americas  
Deutsche Bank Wealth Management  
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Tel. [REDACTED]  
Fax [REDACTED]  
Email [REDACTED]

-----Original Appointment-----

From: Patrick Campion

Sent: Thursday, January 11, 2018 11:42 AM

To: Patrick Campion; Stewart Oldfield; Samantha Harmon; Dana Ponzio; Laura Farischon; Harris Winters; Nina-X Nevidzanska; Andrew King; Brian J Harrington; Charlie Burrows; Frank DeBenedittis; George Hack; Joshua Shoshan; Matt Glassman; Paul Bartilucci; Peter Ferrara; Sam Petrucci; Tazia Smith; Xavier Avila; Martin Zeman; Vahe Stepanian; Joshua Frank

Cc: Bradley Gillin; Cynthia Rodriguez

Subject: Account Planning-Stewart Oldfield [I]

When: Monday, January 22, 2018 8:00 AM-10:00 AM (UTC-05:00) Eastern Time (US & Canada).

Where: CR 2405 / Dial-in Attached

Classification: For internal use only

<< File: Oldfield 2018 Acct Planning.zip >>

Dear All,

As we begin 2018 Account Planning, please note that it is very important for the product groups to review the documents provided ahead of time and come to the meeting with ideas for potential new business in your particular product area. There is quite a bit of focus on this exercise this year.

Please make every effort to be in attendance. If you are absolutely unable, please delegate to someone who can represent you, or if there are multiple people from your product area, you can have one person represent all the accounts.

Documents that are available are attached.

Please contact Samantha Harmon if you have any questions or concerns.

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Patrick Campion's Virtual Meeting Room Details

United States

Virtual Meeting Room number: [REDACTED]

HOST PIN: [REDACTED]

Participant PIN: [REDACTED]

Internal Phone and VC Devices

Virtual Meeting Room number: [REDACTED]

Desktop Video or External Video

Virtual Meeting Room address: [REDACTED]  
[REDACTED]

External Audio Participants:

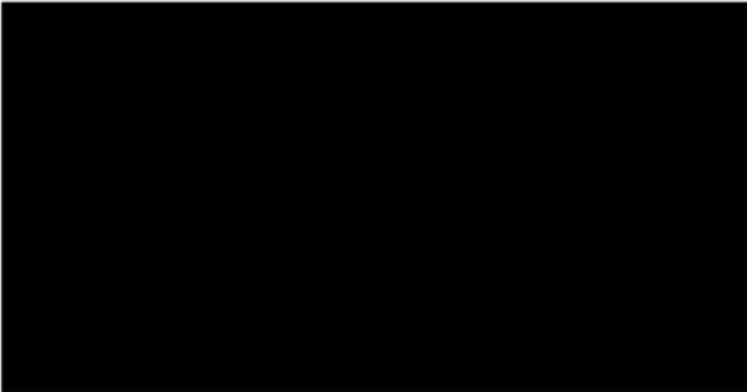
Choose country location below for dial in

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Major Hubs:

Australia  
China  
Germany  
Hong Kong  
India  
regulatory reasons)  
Singapore  
United Kingdom  
United States



Rest of the world:

Austria:  
Belgium  
Canada  
Cayman Islands  
Channel Islands  
France  
Hungary  
Indonesia  
Ireland  
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Malaysia  
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Mexico  
Netherlands  
New Zealand  
Philippines  
Poland  
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Spain  
Sweden  
Taiwan  
Thailand  
United Arab Emirates  
Vietnam

