

Subject: RE: Account Planning sessions [C]
From: Cynthia Rodriguez <[REDACTED]>
Date: Thu, 04 Jan 2018 06:42:34 -0500
To: Stewart Oldfield <[REDACTED]>, Bradley Gillin <[REDACTED]>

Luckily I started this for you earlier in the year. I believe we didn't know which other banks these guys used and what other deals they're currently doing with other institutions.

Sent with BlackBerry Work
(www.blackberry.com)

From: Stewart Oldfield <[REDACTED]>
Date: Wednesday, Jan 03, 2018, 6:18 PM
To: Bradley Gillin <[REDACTED]>, Cynthia Rodriguez <[REDACTED]>
Subject: FW: Account Planning sessions [C]

Fyi. Let's discuss tmw

From: Samantha Harmon
Sent: Tuesday, January 02, 2018 5:31 PM
To: Stewart Oldfield <[REDACTED]>
Subject: Account Planning sessions [C]

Classification: Confidential

Hi Stew,

Below are your names for the account planning session that you had provided.

Please complete the attached template, which hopefully you will find is very much stream-lined.

I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done.

Would you be able to get back to me by Friday? If this isn't possible, let

me know and let's see what we can figure out.

We will also need to schedule the 90 minute session which we are trying to complete in January.

I'm here all week if you have any questions or need any help.

Name

Third Lake

Elysium

General Atlantic

Safanad

Dzialga

Lindemann

Southern Financial/Epstein

Jockey Club

Deering/Crosby

Tisch

Kind regards,
Samantha Harmon

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Samantha Harmon
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