

Subject: RE: DB account docs
From: Stewart Oldfield <[REDACTED]>
Date: Mon, 26 Feb 2018 12:38:13 -0500
To: Richard Kahn <[REDACTED]>
Cc: Bradley Gillin <[REDACTED]>, Cynthia Rodriguez <[REDACTED]>

Rich, just circling back to see if there's anything we can do to be helpful with this. Thanks

From: Stewart Oldfield
Sent: Thursday, February 08, 2018 11:21 AM
To: Richard Kahn <[REDACTED]>
Cc: Bradley Gillin <[REDACTED]> Cynthia Rodriguez
[REDACTED]
Subject: DB account docs

Rich,

Please see attached forms to complete. We will need the originals returned along with the following for KYC purposes. If you would like us to prefill some of the info, just email or call. Note that for the account opening, she will need a DBTCA checking account, DB AG Preferred Banking Acct and DB AG Preferred CD. We can fill in the CD rate/term info later.

- Name(s)
- Address
- Date of Birth
- Social Security Number
- Source of Wealth
- Source of where funds are coming from to fund the CD (bank statement)
- Photo ID

Thanks,

Stew

{cid:image001.png@01D3AEFE.9690BAF0}

Stewart Oldfield, CFA, CAIA
Director

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