

Subject: RE: Account Planning sessions [C] [I]
From: Cynthia Rodriguez <[REDACTED]>
Date: Fri, 05 Jan 2018 17:59:43 -0500
To: Stewart Oldfield <[REDACTED]>,
Bradley Gillin <[REDACTED]>

Classification: For internal use only

Hi,

Attached are the account planning pages for the below clients. A few notes:

- I did not create one for General Atlantic because I wasn't exactly sure if it was General Atlantic you wanted to include or Madison Park Capital LLC. Also,
- I see that Ali Rashid is under the Safand relationship, but I have a completely different profile for Safand as a company.
- Left a few blanks for Tisch's if you can fill it in
- I did not get a chance to do one for Deering/Crosby, but can send it first thing Monday.

I tried my best on these so feel free to edit and send back so that I can update the customer pages on DB Force. Thanks!

Kind regards,

Cynthia Rodriguez

{cid:image001.png@01D0778D.2D49CDD0}

Cynthia Rodriguez

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Deutsche Bank Trust Company Americas
Deutsche Bank Wealth Management
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[REDACTED]

From: Stewart Oldfield
Sent: Wednesday, January 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

{<https://brandportal.intranet.db.com/img/modules/logo.gif>}

Samantha Harmon
Sales Support Analyst

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