2018 Account Planning
RM contribution

Relationship Name: Lindemann
Banker Team: Stewart Oldfield
GCIS Number: 00000427075
Relationship Team:

ISG: Brian Harrington
DPM:
KCP:
Lending: Joshua Frank
Trust/Custody:
WPS:
Deposits: Stewart Oldfield
Other:

Client Profile
This relationship manages the assets of Adam Marc Lindemann and George
Lindemann Jr, sons of billionaire George Lindemann, a serial entrepreneur
that founded and sold a handful of businesses over the past half-century,
most notably his Metro Mobile company that was acquired by Bell Atlantic —
now known as Verizon — for $2.5 billion in 1991 and Southern Union Company
which he sold for $5.7 billion in 2012 of which Lindemann children (George
Jr, Adam, and Sloan Lindemann) all held ownership stakes in.
Adam Lindemann is a private investor and influential collector of
contemporary art and design. In partnership with designer Marc Newson, he re-
launched Ikepod, a Swiss watch design company. He also writes a monthly
column on collecting for The New York Observer. George Lindemann Jr. was an
accomplished equestrian with Olympic hopes, but ultimately served time in
prison for having a once-prized horse killed for insurance money. He is now
a well-known art collector, investor, environmental advocate and
philanthropist in Miami. He serves as the president of the board of
directors of the Bass Museum of Art.
This relationship has had a previous relationship with the bank from 2009 to
2012 with George Lindemann Jr. where he closed his accounts and began
another banking relationship with JP Morgan. Stewart Oldfield worked with
George Lindemann Jr. at Credit Suisse in 2008, and brought the relationship
back to Deutsche Bank in February 2015.

Opportunities and Challenges
{Please add a narrative on the client here, based on what you know and your
relationship which could include any or all of the below which is meant to
be a guide}
[Type here]
What are the key opportunities to grow the relationship?
What are the Customer's financial objectives?
What issues and/or challenges is the Customer facing?

What are the key roadblocks to giving DB more business?

Confidential

Confidential

Confidential