

2018 Account Planning
RM contribution

Relationship Name: Safanad
Banker Team: Stewart Oldfield
GCIS Number: [REDACTED]
Relationship Team:

ISG: Andrew King
DPM: Paul Bartilucci
KCP:
Lending:
Trust/Custody:
WPS:
Deposits: Stewart Oldfield
Other:

Client Profile

Safanad Limited, a global principle investment firm in Geneva was founded by Mr. Komal Bahamdan with the backing of the Bahamdan Group. Now based in New York City and Dubai, the structure is described as a hybrid of a family office, asset manager and endowment and invests in real estate, private equity and public markets. Mr. Bahamdan is the main point of contact for this relationship as well as the main source of wealth. Mr. Bahamdan was also Co-Founder and Managing Partner of BV Group Ventures, LLC. He developed strategic alliances and joint venture, generated deal flow, and was deeply involved in direct and fund investments. He was a Co-Founder of Al-Khabeer Merchant Finance Corporation. He was a Managing Partner at BV Global Partners, L.P. Mr. Bahamdan has significant international principal investment experience where he led and participated in investments in a broad range of industries in the United States, Europe, and the Gulf. He serves as a Vice Chairman of Sara Holding, as a Member of Advisory Board at Sapinda Holding B.V, serves as a Board Member of CEA Capital Partners and Manara Infrastructure Fund. This relationship was established and by banker Stewart Oldfield in January 2017. There is monthly contact with this prospect.

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?

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