Illustrative Draft
Account Planning Initiative July 2016 (v1.0)
Account review information	Main contacts at client and key personnel
Name:	Title / role:	Notes:
Client or Prospect:	Client	Coren Lass	Chairman	Long term relationship with DB, mainly in CIB
Last client meeting	dd/mm/yyyy	Adam Croutear	CIO	Recent hire
Next client meeting	dd/mm/yyyy
Client details	Client insight
Name of WM client	Hampstead Green Capital	Investment objectives	Consistent investment returns; balanced portfolio
Beneficial Owner:	Coren Lass	Risk appetite	Low
Client Identifier (#)	14568234	Succession planning?	n/a
Company name	Hampstead Green Capital	Significant changes to net worth / investments?	Recent liquidity event - details tbc
Length of WM relationship	5 years
Client type	Legal Entity	Competitor relationships	Prime Brokerage with Goldman Sachs. Other relationships with CS, JPM, BNP
Estimated total net worth (€m):	4500	Recent changes to DB relationship / contacts?	No
Estimated liquid assets (€m):	3750
Source of wealth:	Business	Interests	Polo, fine dining
Industry:	Private Equity / Investments	Other	[any other relevant information]
Wealth creation cycle:	Late stage / mature business
Coverage	Key Client Opportunities
GMT:	EMEA	Summary of potential opportunities based on Client details and insight
Sub-GMT:	UK
Booking Centre:	Luxembourg
Relationship Manager:	Name 1
Investment Advisor:	Name 2
CFP:	Name 3
WM Snr Client Executive:	WM ExCo 1
CIB Snr Client Executive (if relevant):	n/a
MB Sponsor	n/a
Additional DB relationship holders (if relevant):	n/a
Financials	Product financials & opportunities
Revenue AuM	CBV	NNA	Discretionary	Advisory	Deposits	Lending	Alternatives	Cap Mkts	CFP/Cross Bank	KCP
2015	Revenue YtD (€k)
2016 YtD	Margin (bps)
2016 target	Significant opportunity
Potential revenue (€k)
Action plan
#	Opportunity	Pricing (bps)	Rev. size of opportunity (€k)	Action	Responsible	Due date	Status	Outcome & Comments
1	Deposits	n/a	€150k	Introduction to Global Head of Lending & Deposits	CRM	dd/mm/yyyy	In progress
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Wealth Management
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Wealth Management

Clean
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Client or Prospect: Client
Last client meeting dd/mm/yyyy
Next client meeting dd/mm/yyyy
Client details Client insight
Name of WM client Investment objectives
Beneficial Owner: Risk appetite
Client Identifier (#) Succession planning?
Company name Significant changes to net worth / investments?
Length of WM relationship
Client type Competitor relationships
Estimated total net worth (€m): Recent changes to DB relationship / contacts?
Estimated liquid assets (€m):
Source of wealth: Interests
Industry: Other
Wealth creation cycle:
Coverage Key Client Opportunities
GMT:
Sub-GMT:
Booking Centre:
Relationship Manager:
Investment Advisor:
CFP:
WM Snr Client Executive:
CIB Snr Client Executive (if relevant):
MB Sponsor
Additional DB relationship holders (if relevant):
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