

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 Leon Black Principal Founder of Apollo

Last client meeting 6/28/2016 Brad Wechsler CEO Chairman of IMAX

Next client meeting TBD

Client details Client insight

Name of WM client Elysium Management Investment objectives Growth

Beneficial Owner: Risk appetite High

Client Identifier (#) 00000490445 Succession planning? n/a

Company name Elysium Management Significant changes to net worth / investments? no

Length of WM relationship

Client type Family Office Competitor relationships US Trust, JPM, GS

Estimated total net worth (€m): 5000/1.1=4545.454545454545 Recent changes to DB relationship / contacts? Departure of Paul Morris

Estimated liquid assets (€m): 500/1.1=454.5454545454545

Source of wealth: Business Interests

Industry: Private Equity / Investments Other

Wealth creation cycle: Mid

Coverage Key Client Opportunities

GMT: Americas \$20MM ISG relationship with the Black Family

Sub-GMT: New York

Booking Centre: New York

Relationship Manager: Stew Oldfield

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 n/a n/a n/a n/a Revenue YtD (€k)

2016 YtD n/a n/a n/a n/a Margin (bps)

2016 target Significant opportunity F48=18181.8181818181818

Potential revenue (€k) 50

Action plan

# Opportunity Pricing (bps) Rev. size of opportunity (€k)

Action Responsible Due date Status Outcome & Comments

1 ISG 50 20000/1.1=18181.8181818181818 Preliminary

conversations Oldfield 12/31/2016 Preliminary

2 KCP 200 50000/1.1=45454.5454545454545 Preliminary

conversations Oldfield 12/31/2016 Preliminary

3 Art Loan 200 TBD Preliminary conversations  
Oldfield 12/31/2016 Preliminary

4

5

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Clean

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Beneficial Owner: Risk appetite

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Sub-GMT:

Booking Centre:

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Investment Advisor:

CFP:

WM Snr Client Executive:

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MB Sponsor

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Financials Product financials & opportunities

Revenue AuM CBV NNA Discretionary Advisory

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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)
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Action	Responsible	Due date	Status Outcome & Comments
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1

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