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: Prospect   Leon Black
Last client meeting   Brad Wechsler
Next client meeting
Client details Client insight
Name of WM client   Elysium Management   Investment objectives
Liquidity / preservation of capital
Beneficial Owner: Risk appetite   Medium
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
Estimated total net worth (€m): Recent changes to DB relationship / contacts?   no
Estimated liquid assets (€m):
Source of wealth: Business   Interests
Industry: Private Equity / Investments   Other
Wealth creation cycle:
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
Potential revenue (€k)
Action plan
Opportunity   Pricing (bps)   Rev. size of opportunity (€k)
Action Responsible   Due date   Status Outcome & Comments
1   ISG   50   20000/1.1=18181.81818181818   Preliminary conversations   Oldfield   12/31/2016   Preliminary
2
3
4
5
Deutsche Bank

Wealth Management
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Wealth Management

Clean
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
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):
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
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