

Subject: Client list for Vista and Canyon [I]
From: Andrew King <[REDACTED]>
Date: Wed, 22 Feb 2017 14:20:24 -0500
To: Stewart Oldfield <[REDACTED]>

Classification: For internal use only

Vista:

Banker

Notes

Email Sent

Response

Bluestem

Oldfield

Michael Billis

Y

Yes- will give it more thought and think about who else might be willing to give it a look

Bright

Oldfield

Y

Dorrance

Oldfield

Y

Forrestal

Oldfield

Y

Illig

Oldfield

Y

Shamrock - Greg Martin

Oldfield

Y

Slome

Oldfield

Y

Yes- Pass for the moment

True North

Oldfield

Y

Latona

Oldfield

Y

Ellin

Oldfield

Y

Tisch - TFMG?

Oldfield

 - KCP

Y

Parkview

Oldfield

Y

Canyon:

Banker

Client Name

Email Sent

Req. #

Andrew Previous Contact

Oldfield

Michael Bills

Y

102

CC

Oldfield

Bright Group

Y

103

Y

Oldfield

Forrestal

Y

104

Y

Oldfield

Cliff Illig

Y

105

Y

Oldfield

Everwatch

Y

106

Y

Oldfield

Shamrock (Greg Martin)

Y

107

Y

Oldfield

Slome

Y

108

Y

Oldfield

True North

Y

109

CC

Oldfield

Perspecta Trust

Y

114

Y

Oldfield

Tisch

CC (KCP)

Oldfield

SK Capital

Y

110

Y

Oldfield

Third Lake

Y

111

Y

Oldfield

JL squared

Y

112

Y

Oldfield

Aspen Grove

Y

115

Y

Oldfield

Comprehensive Financial Management

Y

121

CC

Oldfield

Gerschel

Y

120

Y

Oldfield

Southern Financial

KCP

Oldfield

Georgetown University

Y

119

Y

Oldfield

Glen Warren

Y

116

N

Oldfield

Parkview?

Y

Best regards,
Andrew King

{cid:image001.gif@01D1AA1B.81C7AA00}

Andrew King, CFA
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