

Subject: RE: Account Planning sessions [I]  
From: Samantha Harmon <[REDACTED]>  
Date: Fri, 05 Jan 2018 15:42:48 -0500  
To: Bradley Gillin <[REDACTED]>  
Cc: Stewart Oldfield <[REDACTED]>, Cynthia Rodriguez <[REDACTED]>

Classification: For internal use only

Thank you.

Please make sure there are product people in all the spots. J

Kind regards,  
Samantha Harmon

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{<https://brandportal.intranet.db.com/img/modules/logo.gif>}

Samantha Harmon  
Sales Support Analyst

Deutsche Bank Trust Company Americas  
WM Americas  
345 Park Avenue, 24th Floor

New York, NY, 10154-0004

USA  
Tel. [REDACTED]  
Email [REDACTED]

From: Bradley Gillin  
Sent: Friday, January 05, 2018 3:37 PM  
To: Samantha Harmon <[REDACTED]>  
Cc: Stewart Oldfield <[REDACTED]>; Cynthia Rodriguez <[REDACTED]>  
Subject: FW: Account Planning sessions [I]

Classification: For internal use only

Samantha,

GCIS #s below. Templates will follow on Monday. Thanks.

Third Lake

• [REDACTED]

Elysium

• [REDACTED]

General Atlantic

• [REDACTED]

Safanad

• [REDACTED]

Dzialga

• [REDACTED]

Lindemann

• [REDACTED]

Southern Financial/Epstein

• [REDACTED]

Jockey Club

• [REDACTED]

Deering/Crosby

• [REDACTED]

Tisch

• [REDACTED]

Regards,  
Brad

From: Samantha Harmon  
Sent: Tuesday, January 02, 2018 5:31 PM  
To: Stewart Oldfield <[REDACTED]>  
Subject: Account Planning sessions [C]

Classification: Confidential

Hi Stew,

Below are your names for the account planning session that you had provided.

Please complete the attached template, which hopefully you will find is very much stream-lined.

I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done.

Would you be able to get back to me by Friday? If this isn't possible, let me know and let's see what we can figure out.

We will also need to schedule the 90 minute session which we are trying to complete in January.

I'm here all week if you have any questions or need any help.

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Name

Third Lake

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Kind regards,  
Samantha Harmon

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