

2018 Account Planning
RM contribution

Relationship Name: Madison Park Capital LLC/General Atlantic
Banker Team: Stewart Oldfield
GCIS Number: ██████████
Relationship Team:

ISG: Andrew King
DPM: Paul Bartilucci
KCP: Tazia Smith
Lending: Laura Farischon
Trust/Custody:
WPS: Sam Petrucci
Deposits: Charlie Burrows
Other:

Client Profile

General Atlantic (also known as "GA") is an American worldwide growth equity firm providing capital and strategic support for growth companies. GA is based in New York, New York.[1] <https://en.wikipedia.org/wiki/General_Atlantic> The firm was founded in 1980 as the captive investment team for Atlantic Philanthropies, a philanthropic organization founded by Charles F. Feeney <https://en.wikipedia.org/wiki/Charles_F._Feeney>, the billionaire co-founder of Duty Free Shoppers Ltd.[2] <https://en.wikipedia.org/wiki/General_Atlantic>

As of June 30, 2016, General Atlantic has approximately \$19.6 billion in assets under management and more than 100 investment professionals based in New York City <https://en.wikipedia.org/wiki/New_York_City>, Greenwich <<https://en.wikipedia.org/wiki/Greenwich>>, Palo Alto <https://en.wikipedia.org/wiki/Palo_Alto>, Sao Paulo <https://en.wikipedia.org/wiki/Sao_Paulo>, London <<https://en.wikipedia.org/wiki/London>>, Munich <<https://en.wikipedia.org/wiki/Munich>>, Amsterdam <<https://en.wikipedia.org/wiki/Amsterdam>>, Beijing <<https://en.wikipedia.org/wiki/Beijing>>, Hong Kong <https://en.wikipedia.org/wiki/Hong_Kong>, Mumbai <<https://en.wikipedia.org/wiki/Mumbai>> and Singapore <<https://en.wikipedia.org/wiki/Singapore>>.[3] <https://en.wikipedia.org/wiki/General_Atlantic> According to Private Equity International, a proprietary ranking of the largest 300 private equity firms in the world, General Atlantic is the 6th largest. In the last five years, as of 2014, GA rose from no. 12 to no. 6

Madison Park Capital, LLC is the entity that manages partner capital internally and functions as a family office for the 30+ partners of GA. The General Partners, Managers, Trustees, and Directors are:

William E. Ford – CEO of GA
Steven A. Denning – Chairman of GA
David C. Hodgson – Vice Chairman
Eugene P. Lynch
Richard B. Gold

This entity has a brokerage account with DB with a Market Value of ~\$3mm, consisting primarily of CLO equity sold through KCP. This relationship has been with DB since June 2014 and is currently KCP adopted. Gene Lynch is our contact person.

Opportunities and Challenges

We have substantial opportunity to pursue with this account. The partners control a lot of capital and are financially sophisticated. They are willing to look at any interesting transaction. While this is an opportunity, it is also a challenge since there is no specific focus. We have traded CLO equity with them, and discussed everything from risk premia to real estate to private markets.

More challenging is the fact that they have relationships with the entire street and each partner also has money managed away from the internal family office. Because they are a large private equity firm, they have access to a lot of direct deal flow. We need to find a way to be more relevant to them.

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