

Clients+Products												
Contact Information			KCP	AFS	Structured Notes	Periodic communication	Events/	Entertainment				
General Information			Current Offerings			General Current Offerings			September Offerings			
Relationship Name			Family Office Name	First Last	Claimed?	C/P/I	Email	Phone				
Address City State Zip			Private	Markets Focus	Capital Markets	Focus	Research	Focus				
Notes To Do			Suntex	AcTRS	RIN	Retrofit	ABR	Astra	Extell	RESOF	Prot	
Phoenix AFS Focus			Research Focus	Risk Factors	Notes	To Do	Interest	Notes	MS	B		
Offered Jump Plu			MS Apple Autocall	MS Crude Oil Autocall	HSBC SX5E	Buffered	Accelerat					
ed Return			CS XOP Accelerated Return	CS SPX Callable	JP SPX Twin Win	MS SPX	Buffered	Jump				
CIO View			Tax Topics	Structured Notes	Other Interests	Frieze London	(2015)	Invite				
Invite Sent/ response			Tailgate (\$375)	Deposit Pref.	CD							
Schmidt, Eric	Hillspire LLC	P				1010 El Camino Real, Suite 200	Menlo					
o Park CA	94025		General, including real estate. Want yield. Like trophy assets. Want co-i									
nvest multi-asset.	FX and rates hedging		looking at cheap assets in Europe. Could use tax sh									
ield against GOOG share sales	RESOF, Extel.		Set up ISDA. Deposits teaser sent 11/12, follow up									
1/5, 8/12	teaser sent 2/5		sent 3/1									
			sent 2/24. passed 3/27									
			sent 3/16									
			Sent 9/14									
			IF (COUNTA(AH4,AI4,AJ4,AK4,AL4,AM4,AN4,AO4)>0,"Y","")=									
Kimmel, Adam	Adam Kimmel	C/P										
5,AO5)>0,"Y","")=	Y	Y										
Cross, Lisa	Adreinne	Cannella	P			adrienne@jbhe.com	516-307-8855	300				
Old Country Rd, Suite 351	Mineola NY	11510										
			IF (COUNTA(AH6,AI6,AJ6,AK6,AL6,AM6,AN6,AO6)>0,"Y","")=									
Andrew Farkas	Kimble prospect	active				212-593-5700	717 Fifth Ave, 19th					
FL New York	NY	10022										
			IF (COUNTA(AH7,AI7,AJ7,AK7,AL7,AM7,AN7,AO7)>0,"Y","")=									
Forrestal Capital	Annette Franqui	P				Afranqui@forrestalcapital.com	305-961-2848	1450				
Brickell Avenue	Miami FL	33131				General n/a	sent 12/12, follow-up 1/5, 8/12					
3/1 sent 2/26			IF (COUNTA(AH8,AI8,AJ8,AK8,AL8,AM8,AN8,AO8)>0,"Y","")=Y Sent 9/14 Sent									
9/14 Sent 9/14	Y	Sent 10/1				Sent 10/1						
Ari Glass	C/P											
= Y	Y		IF (COUNTA(AH9,AI9,AJ9,AK9,AL9,AM9,AN9,AO9)>0,"Y","")=									
Green, Alex	Alex Green	agreeen@calctrading.com	911 Carriage Way				Southlake					
76092												
			IF (COUNTA(AH10,AI10,AJ10,AK10,AL10,AM10,AN10,AO10)>0,"Y","")=									
Bhalla, Ajay	Ajay Bhalla	P										
M11,AN11,AO11)>0,"Y","")=	Y	Y										
			IF (COUNTA(AH11,AI11,AJ11,AK11,AL11,A									
Avi Kestenbaum	Janco lead	inactive	C/P									
12,AI12,AJ12,AK12,AL12,AM12,AN12,AO12)>0,"Y","")=												
Alan Kufeld	Robertson lead	inactive	I			917-438-3992	1350 Avenue of Americas	New York				
NY 10019												
			IF (COUNTA(AH13,AI13,AJ13,AK13,AL13,AM13,AN13,AO13)>0,"Y","")= Y									
Zubillaga, Alex	Alex Zubillaga	C/P					212-433-1210	345				
Park Ave, 12th Fl	New York	NY				10152						
			IF (COUNTA(AH14,AI14,AJ14,AK14,AL14,AM14,AN14,AO14)>0,"Y","")=									
Murstein, Alvin	Alvin Murstein	P					New York					
			IF (COUNTA(AH15,AI15,AJ15,AK15,AL15,AM15,AN15,AO15)>0,"Y","")= Y Y									
Murstein, Alvin	Andrew Murstein	P					New York					
			IF (COUNTA(AH16,AI16,AJ16,AK16,AL16,AM16,AN16,AO16)>0,"Y","")= Y Y									
Anup Patel												
			IF (COUNTA(AH17,AI17,AJ17,AK17,AL17,AM17,AN17,AO17)>0,"Y","")=									
Persico, Anthony	Anthony Persico	I										
			IF (COUNTA(AH18,AI18,AJ18,AK18,AL18,AM18,AN18,AO18)>0,"Y","")= Sent 10/1 Sent 10/1									
Algappan, Arun	Arun Alagappan	P					210 East 86th St, Su					
ite 601 New York	NY	10028										
			IF (COUNTA(AH19,AI19,AJ19,AK19,AL19,AM19,AN19,AO19)>0,"Y","")=									
Augenblick, Andy	Andy Augenblick											
730 Park Ave	New York	NY				10021						
			IF (COUNTA(AH20,AI20,AJ20,AK20,AL20,AM20,AN20,AO20)>0,"Y","")=									
Cold Spring Harbor Laboratory	Dill Ayres	P					1 Bungtown R					
d Cold Spring Harbor	NY	11724										
			IF (COUNTA(AH21,AI21,AJ21,AK21,AL21,AM21,AN21,AO21)>0,"Y","")=									
Cavalry Andrew	Zaro P											
			IF (COUNTA(AH22,AI22,AJ22,AK22,AL22,AM22,AN22,AO22)>0,"Y","")=									
William Berkman	Convey lead	active					650 Madison Ave	New York				
10022												
			IF (COUNTA(AH23,AI23,AJ23,AK23,AL23,AM23,AN23,AO23)>0,"Y","")=									
Barry Bloom	McCarthy prospect	active					655 Madison Ave	New				
York NY	10021											
			IF (COUNTA(AH24,AI24,AJ24,AK24,AL24,AM24,AN24,AO24)>0,"Y","")=									
Willett Advisors	Brad Briner	P					New York					
			Real Assets with focus on natural resources and real estate n/a commodities 20% ownershi									
p cap. Funds or direct.	Equity rates of return (~20%),	\$30-\$40mm size	Intro to Todd Henderson	sent								
12/18 sent 12/5	sent 3/1	discussed 2/25	no interest	sent 3/16.	passed 4/13							
			IF (COUNTA(AH25,AI25,AJ25,AK25,AL25,AM25,AN25,AO25)>0,"Y","")= Y									
Louis Cailoa												
			IF (COUNTA(AH26,AI26,AJ26,AK26,AL26,AM26,AN26,AO26)>0,"Y","")=									
Robert Haier	C/P											
			IF (COUNTA(AH27,AI27,AJ27,AK27,AL27,AM27,AN27,AO27)>0,"Y","")=									
Bryan R.	Lawrence											
			IF (COUNTA(AH28,AI28,AJ28,AK28,AL28,A									
M28,AN28,AO28)>0,"Y","")=												
Yorktown Partners, LLC	Bryan H.	Lawrence	P					410				
Park Ave, 19th Fl	New York	NY				10022						
			IF (COUNTA(AH29,AI29,AJ29,AK29,AL29,AM29,AN29,AO29)>0,"Y","")=									
Bryce Markus	Schrab prospect	active				bmarkus@bluemountaincapital.com						
			IF (COUNTA(AH30,AI30,AJ30,AK30,AL30,AM30,AN30,AO30)>0,"Y","")=									

0,AL30,AM30,AN30,AO30)>0,"Y","")=

Bluestem LLC P [REDACTED] 212 E. Main Street, Suite 201 Charlottesville
 lle VA 22902 General sent 3/1. Passed 3/12 IF (COUNTA (AH31,AI31,AJ31,AK31,AL31,AM31,AN31
 ,AO31)>0,"Y","")=

Orix Bonnie Mitra P [REDACTED] 1717 Main Street, Suite 1100 Dallas TX
 75201 CLOs, consumer finance, esoteric have complete portal access. Primarily focused on r
 ates research 10% ROI target, up to \$50mm size call on AcTRS, CLO intro (Chris D'Auria)
 teaser sent 11/25, discussed 1/20 sent 12/18, met w/ Baxter 1/20 sent 12/5 Follod up 9/10
 teaser sent and call 2/5. passed 3/27 sent 3/1 sent 3/16 sent 7/28 Sent 9/10
 IF (COUNTA (AH32,AI32,AJ32,AK32,AL32,AM32,AN32,AO32)>0,"Y","")= Y

Ben Rechler Powers prospect inactive [REDACTED] IF (COUNTA (AH33,AI33,AJ33,AK3
 3,AL33,AM33,AN33,AO33)>0,"Y","")=

Brian Blechman C/P [REDACTED] IF (COUNTA (AH34,AI34,AJ34,AK34,AL34,AM34,AN34
 ,AO34)>0,"Y","")= Y Y

Brooks Duncan I [REDACTED] IF (COUNTA (AH35,AI35,AJ35,AK35,AL35,AM35,AN35,AO35)>0
 ,"Y","")= Y Y

Bruce Gross Kimble lead active C/P bruce.gross@lennar.com 305-559-4000 700 Northwes
 t 107th Ave Miami FL 33172 IF (COUNTA (AH36,AI36,AJ36,AK36,AL36,AM36,AN36,AO36)>0,"Y","")
 = Y Y

Elysium Management Brad Wechsler P [REDACTED] 800 Park Ave, 12th F
 l New York NY 10021 IF (COUNTA (AH37,AI37,AJ37,AK37,AL37,AM37,AN37,AO37)>0,"Y","")
 =

Cathy Handley C/P [REDACTED] IF (COUNTA (AH38,AI38,AJ38,AK38,AL38,AM38,AN38,AO38)>0
 ,"Y","")= Y Y Sent 10/1 Sent 10/1

SK Family Office Charles Britton P [REDACTED] IF (COUNTA (AH39,AI39,
 AJ39,AK39,AL39,AM39,AN39,AO39)>0,"Y","")= Y Sent 9/11 Sent 9/11- Interested Sent 9/11

Sent 9/11 Y Y Y

Cary Brody C/P [REDACTED] IF (COUNTA (AH40,AI40,AJ40,AK40,AL40,A
 M40,AN40,AO40)>0,"Y","")= Y Y Y

Schmidt, Eric Hillspire LLC Chuck Chai P [REDACTED] 1010 El Camino Real,
 Suite 200 Menlo Park CA 94025 General, including real estate. Want yield. Like t
 rophy assets. Want co-invest multi-asset. FX and rates hedging looking at cheap assets in E
 urope. Could use tax shield against GOOG share sales RESOF, Extel. Set up ISDA. Deposits teas
 er sent 11/12, follow up 1/5, 8/12 teaser sent 2/5 sent 3/1 sent 2/24. passed 3/27 sent
 3/16 Sent 9/14 IF (COUNTA (AH41,AI41,AJ41,AK41,AL41,AM41,AN41,AO41)>0,"Y","")=

Caroline Conegliano I [REDACTED] IF (COUNTA (AH42,AI42,AJ42,AK4
 2,AL42,AM42,AN42,AO42)>0,"Y","")= Y Y Y

Falk, Charles Charles Falk I [REDACTED] 25 Devonshire Lane
 Mendham NJ 7945 IF (COUNTA (AH43,AI43,AJ43,AK43,AL43,AM43,AN43,AO43)>0,"Y","")= Y Y
 Christopher Goldberg cgoldberg@gendelman.com IF (COUNTA (AH44,AI44,AJ44,AK44,AL44,AM44,AN44
 ,AO44)>0,"Y","")=

Charles Krusen Jacoby lead active C/P [REDACTED] IF (COUNTA (AH
 45,AI45,AJ45,AK45,AL45,AM45,AN45,AO45)>0,"Y","")= Y Y Y

Winston Advisors Christopher Donabedian P [REDACTED] 200 Technec
 nter Drive, Suite 200 Milford OH 45150 IF (COUNTA (AH46,AI46,AJ46,AK46,AL46,AM46,AN46,AO46)>0
 ,"Y","")=

Glenmede [REDACTED] 1650 Market Street Suite 1200 Philadelphia
 PA 19103 IF (COUNTA (AH47,AI47,AJ47,AK47,AL47,AM47,AN47,AO47)>0,"Y","")=

Illig, Cliff P [REDACTED] 8900 State Line Road 5th Floor Leawood KS 6620
 6 IF (COUNTA (AH48,AI48,AJ48,AK48,AL48,AM48,AN48,AO48)>0,"Y","")=

Schaefer, Marla Marla Schaefer P [REDACTED] IF (COUNTA (AH49,AI49,AJ49,AK4
 9,AL49,AM49,AN49,AO49)>0,"Y","")= Y Y

Dorrance Family DFE Enterprises Clint Gossage P [REDACTED] IF (COUNTA (AH
 50,AI50,AJ50,AK50,AL50,AM50,AN50,AO50)>0,"Y","")= sent 8/26 sent 9/29

Colby Rollins C/P [REDACTED] IF (COUNTA (AH51,AI51,AJ51,AK51,AL51,AM51,AN51,AO51)>0
 ,"Y","")= Y Y

Curtis Conway C/P [REDACTED] IF (COUNTA (AH52,AI52,AJ52,AK52,AL52,AM52,AN52,AO52)>0
 ,"Y","")= Y Y

David Manlowe Erskine prospect inactive [REDACTED] IF (COUNTA (AH53,AI53,
 AJ53,AK53,AL53,AM53,AN53,AO53)>0,"Y","")=

David Angstreich [REDACTED] IF (COUNTA (AH54,AI54,AJ54,AK54,AL54,AM54,AN54,AO54)>0
 ,"Y","")=

David Halliwill C/P [REDACTED] IF (COUNTA (AH55,AI55,AJ55,AK55,AL55,AM55,AN55
 ,AO55)>0,"Y","")= Y Y

Bright Group Darren Campf P [REDACTED] 200 Greenbrier Road Summersville
 WV 26651 IF (COUNTA (AH56,AI56,AJ56,AK56,AL56,AM56,AN56,AO56)>0,"Y","")= Sent 10/1 Sent
 10/1

David Cooper C/P [REDACTED] IF (COUNTA (AH57,AI57,AJ57,AK57,AL57,AM57,AN57
 ,AO57)>0,"Y","")= Y Y

Deepak Raj [REDACTED] IF (COUNTA (AH58,AI58,AJ58,AK58,AL58,AM58,AN58,AO58)>0,"Y","")
 =

Daniel Heflin Sohrab prospect inactive P [REDACTED] IF (COUNTA (AH
 59,AI59,AJ59,AK59,AL59,AM59,AN59,AO59)>0,"Y","")= Y Y

Blank David Homrich dhomrich@ambfo.com 3223 Howell Mill Road, Northwest Atlanta GA
 30347 IF (COUNTA (AH60,AI60,AJ60,AK60,AL60,AM60,AN60,AO60)>0,"Y","")= Sent 10/1 Sent 10/1

Sonen Capital David Hood P dhood@sonencapital.com 50 Osgood Place, Ste. 320 San
 Francisco CA 94133 IF (COUNTA (AH61,AI61,AJ61,AK61,AL61,AM61,AN61,AO61)>0,"Y","")=

David Mitchell [REDACTED] IF (COUNTA (AH62,AI62,AJ62,AK62,AL62,AM62,AN62
 ,AO62)>0,"Y","")=

True North Advisors P DManiktala@truenorthadvisors.com 8350 N. Central Expressway,
Ste. 725 Dallas TX 75206 IF (COUNTA(AH63, AI63, AJ63, AK63, AL63, AM63, AN63, AO63))>0, "Y", "")
= David Deutsch [REDACTED] IF (COUNTA(AH64, AI64, AJ64, AK64, AL64, AM64, AN64, AO64))>0, "Y", "")
= Infinity Q [REDACTED] 888 7th Avenue New York NY 10106 Real Estate,
yield, esoteric multi-asset for Wildcat fund macro, vol? 20% IRR hurdle. Unconstrain
ed. Size up to \$40mm with control. Structured and leverage ok sent 8/12 teaser sent 2/5 sent
3/1. Passed 3/30 sent 2/26. Passed 3/30 sent 3/16. Passed 3/30 IF (COUNTA(AH65, AI65, AJ65, AK6
5, AL65, AM65, AN65, AO65))>0, "Y", "")=
Makan, Divesh ICONIQ Capital LLC ICONIQ Capital LLC [REDACTED] 394 Pacific
Ave, 2nd Floor San Francisco CA 94111 Credit n/a need to focus on unique solutions
sent 12/18 sent 2/26 IF (COUNTA(AH66, AI66, AJ66, AK66, AL66, AM66, AN66, AO66))>0, "Y", "")=
Sonen Capital P [REDACTED] 50 Osgood Place, Ste. 320 San Francisc
o CA 94133 IF (COUNTA(AH67, AI67, AJ67, AK67, AL67, AM67, AN67, AO67))>0, "Y", "")=
Edouard Gerschel C/P [REDACTED] IF (COUNTA(AH68, AI68, AJ68, AK68, AL68, AM68, AN68
, AO68))>0, "Y", "")=
Nicholas Milo Gonzalez [REDACTED] 15 Enterprise, Ste. 550 Alis
o Viejo CA 92656 DPM BRCM hedge into diversified assets. Also want broad banking relatio
nship IF (COUNTA(AH69, AI69, AJ69, AK69, AL69, AM69, AN69, AO69))>0, "Y", "")= Sent 10/1 Sent 10/1
Erik Moody [REDACTED] IF (COUNTA(AH70, AI70, AJ70, AK70, AL70, AM70, AN70, AO70))>0, "Y", "")= Sent
10/1 Sent 10/1
Lindemann Family Eran Schreiber [REDACTED] IF (COUNTA(AH71, AI71,
AJ71, AK71, AL71, AM71, AN71, AO71))>0, "Y", "")= Y
Parami Eric Attias P [REDACTED] 6 East 74th Street New York NY
10021 IF (COUNTA(AH72, AI72, AJ72, AK72, AL72, AM72, AN72, AO72))>0, "Y", "")=
Essig Erin Enright [REDACTED] 174 Nassau Street #320 Princeton NJ
08542 IF (COUNTA(AH73, AI73, AJ73, AK73, AL73, AM73, AN73, AO73))>0, "Y", "")= Sent 10/1 Sent 10/1
EverWatch Financial Frohman Anderson P [REDACTED] 8 Sound Shor
e Drive, Suite 200 Greenwich CT 06830 General, but like industrial/agg services, o
il & gas, enviromental Maintain lvg. against some commercial RE. Used to have large CL loan @ CS a
nd BAML Send RESOF and Astra sent 8/12 sent 3/18. Passed 3/30 sent 3/16 IF (COUNTA(AH
74, AI74, AJ74, AK74, AL74, AM74, AN74, AO74))>0, "Y", "")= Sent 10/1 Sent 10/1
Attori, Gregory Gregory Attorri I [REDACTED] 485 Park Ave, Suite 4B New
York NY 10022 IF (COUNTA(AH75, AI75, AJ75, AK75, AL75, AM75, AN75, AO75))>0, "Y", "")= Y Y
Coleman, Gail Gail Coleman P [REDACTED] 405 Lexington
n Ave, Fl 71 New York NY 10174 IF (COUNTA(AH76, AI76, AJ76, AK76, AL76, AM76, AN76, AO76))>0
, "Y", "")= Y Y
Caruso, Richard Gary Deilella P [REDACTED] 795 E. Lancaster Ave
nue Suite 200 Villanova PA 19085 General, prefer funds or direct PE sent 7/28
IF (COUNTA(AH77, AI77, AJ77, AK77, AL77, AM77, AN77, AO77))>0, "Y", "")= Sent 10/1 Sent 10/1
Yorktown Partners, LLC George Petrides I [REDACTED] IF (COUNTA(AH
78, AI78, AJ78, AK78, AL78, AM78, AN78, AO78))>0, "Y", "")= Y Y
Duncan Investments Gregg Hammer P [REDACTED] 1100 Louisiana Street, Suite
5200 Houston TX 77002 IF (COUNTA(AH79, AI79, AJ79, AK79, AL79, AM79, AN79, AO79))>0, "Y", "")= Sent
10/1 Sent 10/1
Gene Lynch [REDACTED] IF (COUNTA(AH80, AI80, AJ80, AK80, AL80, AM80, AN80, AO80))>0
, "Y", "")=
Disney, Roy Shamrock Greg Martin P [REDACTED] 3500 W. Olive Avenue
, Suite 700 Burbank CA 91505 Yield n/a real estate referral? Merage connection?
sent 11/7, discussed 1/15, follow up 8/12 teaser sent 2/5 sent 3/1 sent 2/26 ment
ioned 11/6, sent 3/16 IF (COUNTA(AH81, AI81, AJ81, AK81, AL81, AM81, AN81, AO81))>0, "Y", "")= Sent 10/1
Sent 10/1
Moriwaki, Gary S. Gary Moriwaki I [REDACTED] [REDACTED]
100 Park Ave, 3rd Fl New York NY 10017 IF (COUNTA(AH82, AI82, AJ82, AK82, AL82, AM82, AN82
, AO82))>0, "Y", "")= Y Y
Ford [REDACTED] 200 Crescent Court Suite 1365 Dallas TX 75021 IF (COUNTA(AH
83, AI83, AJ83, AK83, AL83, AM83, AN83, AO83))>0, "Y", "")=
Nicholas Gosha Zandt [REDACTED] DPM BRCM hedge into diversified
assets. Also want broad banking relationship IF (COUNTA(AH84, AI84, AJ84, AK84, AL84, AM84, AN84, AO84))>0
, "Y", "")= Sent 10/1 Sent 10/1
Beller, Harry Harry Beller C/P [REDACTED] 12 Golar Dr Monsey NY 1095
2 IF (COUNTA(AH85, AI85, AJ85, AK85, AL85, AM85, AN85, AO85))>0, "Y", "")= Y Y
Holterbosch, Heidi Heidi Holterbosch P [REDACTED] 212-421-3800 375
Park Ave New York NY 10152 IF (COUNTA(AH86, AI86, AJ86, AK86, AL86, AM86, AN86, AO86))>0
, "Y", "")= Y Y
Edge [REDACTED] 1380 W. Paces Ferry Rd. Suite 1000 Atlanta GA 3032
7 IF (COUNTA(AH87, AI87, AJ87, AK87, AL87, AM87, AN87, AO87))>0, "Y", "")=
Keenan, William Howard William Keenan P [REDACTED] 410
Park Ave New York NY 10022 IF (COUNTA(AH88, AI88, AJ88, AK88, AL88, AM88, AN88, AO88))>0
, "Y", "")= Y Y
Tharani, Haresh Haresh Tharani P [REDACTED] IF (COUNTA(AH89, AI89, AJ89, AK8
9, AL89, AM89, AN89, AO89))>0, "Y", "")= Y Y
Ira Halperin I [REDACTED] IF (COUNTA(AH90, AI90, AJ90, AK90, AL90, A
M90, AN90, AO90))>0, "Y", "")= Y Y
Slome, Ian Ian Slome P [REDACTED] 150 East 58th Street, 34th F
loor New York NY 10155 RE (US, Europe, R+C) via direct investment, PE or struct. Pr
oducts; PE and HF n/a Risk averse. Already seeing HF ideas from AFS send RIN? teas
er sent 2/5 passed 2/27 mentioned 2/26, sent 3/16. Passed 3/30 IF (COUNTA(AH91, AI91, AJ91, AK9

1,AL91,AM91,AN91,AO91)>0,"Y","")=

Richard Simon C/P [REDACTED] IF (COUNTA (AH92, AI92, AJ92, AK92, AL92, AM92, AN92, AO92) >0,"Y","")= Y Y

Inder Sodhi Jensen prospect inactive C/P [REDACTED] IF (COUNTA (AH93, AI93, AJ93, AK93, AL93, AM93, AN93, AO93) >0,"Y","")= Y Y

Ironsides AM P [REDACTED] 511 Tarrytown Center Rocky Mount NC 2780

4 General meeting in NC sent 8/12 sent 3/1 sent 3/24 IF (COUNTA (AH94, AI94, AJ94, AK94, AL94, AM94, AN94, AO94) >0,"Y","")=Y Sent 9/14 Sent 9/14 Sent 9/14 Y

Jamie Smith [REDACTED] IF (COUNTA (AH95, AI95, AJ95, AK95, AL95, AM95, AN95, AO95) >0,"Y","")=

John Straus [REDACTED] IF (COUNTA (AH96, AI96, AJ96, AK96, AL96, AM96, AN96, AO96) >0,"Y","")=

Guilford Company James Landrigan P [REDACTED] P.O. Box 13439 Richmond VA 23225 IF (COUNTA (AH97, AI97, AJ97, AK97, AL97, AM97, AN97, AO97) >0,"Y","")=

Levy, Jared Jared Levy I [REDACTED] 1633 Broadway New York NY 10019 IF (COUNTA (AH98, AI98, AJ98, AK98, AL98, AM98, AN98, AO98) >0,"Y","")= Y Y

Keiser, Jason Jason Keiser [REDACTED] IF (COUNTA (AH99, AI99, AJ99, AK99, AL99, AM99, AN99, AO99) >0,"Y","")= Sent 10/1 Sent 10/1

Dorrance Family DFE Enterprises Jason Stiles P [REDACTED] 480-367-7000 IF (COUNTA (AH100, AI100, AJ100, AK100, AL100, AM100, AN100, AO100) >0,"Y","")= sent 9/11 sent 9/29

Spruce Private Investors LLC [REDACTED] 263 Tresser Blvd, 15th Floor Stamford CT 06901 Systematic gamma decay Trading with CS Introduce AFS or CB&S IF (COUNTA (AH101, AI101, AJ101, AK101, AL101, AM101, AN101, AO101) >0,"Y","")=

John Barber Schrab prospect inactive I [REDACTED] IF (COUNTA (AH102, AI102, AJ102, AK102, AL102, AM102, AN102, AO102) >0,"Y","")= Y Y

Wanek, Todd Thirdlake Capital Joakim Bergander [REDACTED] IF (COUNTA (AH103, AI103, AJ103, AK103, AL103, AM103, AN103, AO103) >0,"Y","")= sent 9/14 sent 9/29

Fitzgibbons, John John Fitzgibbons P [REDACTED] 405 Lexington Ave, Fl 71 New York NY 10174 IF (COUNTA (AH104, AI104, AJ104, AK104, AL104, AM104, AN104, AO104) >0,"Y","")= Y Y

Jonathon Botwinick C/P [REDACTED] IF (COUNTA (AH105, AI105, AJ105, AK105, AL105, AM105, AN105, AO105) >0,"Y","")= Y Y

Jeffrey Coopersmith I [REDACTED] IF (COUNTA (AH106, AI106, AJ106, AK106, AL106, AM106, AN106, AO106) >0,"Y","")= Y Y

Dock Street P [REDACTED] 510 Feheley Drive King of Prussia PA 19406 General n/a already covered by PCS, just check in occasionally IF (COUNTA (AH107, AI107, AJ107, AK107, AL107, AM107, AN107, AO107) >0,"Y","")=

Forrestal Capital Jonathan Fischer P [REDACTED] 1450 Brickell Avenue Miami FL 33131 General n/a sent 12/12, follow-up 1/5, 8/12 sent 3/1 sent 2/26 IF (COUNTA (AH108, AI108, AJ108, AK108, AL108, AM108, AN108, AO108) >0,"Y","")=Y Sent 9/14 Sent 9/14 Y Sent 10/1 Sent 10/1

Jeff Kirwood [REDACTED] IF (COUNTA (AH109, AI109, AJ109, AK109, AL109, AM109, AN109, AO109) >0,"Y","")=

JL Squared Group [REDACTED] 2929 Arch Street, 13th Floor Philadelphia PA 19104 IF (COUNTA (AH110, AI110, AJ110, AK110, AL110, AM110, AN110, AO110) >0,"Y","")=

EverWatch Financial Joe Monaco P [REDACTED] 8 Sound Shore Drive, Suite 200 Greenwich CT 06830 General, but like industrial/agg services, oil & gas, environmental Maintain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML Send RESOF and Astra sent 8/12 sent 3/18. Passed 3/30 sent 3/16 IF (COUNTA (AH111, AI111, AJ111, AK111, AL111, AM111, AN111, AO111) >0,"Y","")= Sent 10/1 Sent 10/1

John Lummis C/P [REDACTED] IF (COUNTA (AH112, AI112, AJ112, AK112, AL112, AM112, AN112, AO112) >0,"Y","")= Y Y

Crystal, Jonathan Jonathan Crystal I [REDACTED]

Fianncial Sq 32 Old Slip New York NY 10005 IF (COUNTA (AH113, AI113, AJ113, AK113, AL113, AM113, AN113, AO113) >0,"Y","")= Y Y

Slome, Ian P [REDACTED] 150 East 58th Street, 34th Floor New York NY 10155 RE (US, Europe, R+C) via direct investment, PE or struct. Products; PE and HF n/a Risk averse. Already seeing HF ideas from AFS send RIN? teaser sent 2/5 passed 2/27 mentioned 2/26, sent 3/16. Passed 3/30 IF (COUNTA (AH114, AI114, AJ114, AK114, AL114, AM114, AN114, AO114) >0,"Y","")=

Julie Richardson C/P [REDACTED] IF (COUNTA (AH115, AI115, AJ115, AK115, AL115, AM115, AN115, AO115) >0,"Y","")= Y Y

Snyder, Daniel Karl Schreiber P [REDACTED] 11900 River Road Potomac MD 20854 IF (COUNTA (AH116, AI116, AJ116, AK116, AL116, AM116, AN116, AO116) >0,"Y","")=Y Sent 9/14 Sent 9/14 Y Sent 10/1 Sent 10/1

Dzialga, Kirsten & Mark Kristen Dzialga P [REDACTED] 15 Meadowcroft Lane Greenwich CT 6830 IF (COUNTA (AH117, AI117, AJ117, AK117, AL117, AM117, AN117, AO117) >0,"Y","")=

White Deer Energy Kristin P [REDACTED] IF (COUNTA (AH118, AI118, AJ118, AK118, AL118, AM118, AN118, AO118) >0,"Y","")= Y Y

Kelly, Judy Judy Kelly C/P [REDACTED] 445 Park Ave, Suite 1502 New York NY 10022 IF (COUNTA (AH119, AI119, AJ119, AK119, AL119, AM119, AN119, AO119) >0,"Y","")= Y

Kevin Ryan C/P [REDACTED] IF (COUNTA (AH120, AI120, AJ120, AK120, AL120, AM120, AN120, AO120) >0,"Y","")= Y Y

Makan, Divesh ICONIQ Capital LLC ICONIQ Capital LLC [REDACTED] 894 Pacific Ave, 2nd Floor San Francisco CA 94111 Credit n/a need to focus on unique solutions sent 12/18 sent 2/26 IF (COUNTA (AH121, AI121, AJ121, AK121, AL121, AM121, AN121, AO121) >0,"Y","")=

=

Ken Jones [REDACTED] IF (COUNTA(AH122, AI122, AJ122, AK122, AL122, AM122, AN122, AO122)) > 0
 , "Y", "" =

Caruso Affiliated Kelly Masuda [REDACTED] 101 The Grove Drive Los Angeles CA 90036 Real Estate, general sent 2/26. Passed 3/20 IF (COUNTA(AH123, AI123, AJ123, AK123, AL123, AM123, AN123, AO123)) > 0, "Y", "" =

Lara Brody [REDACTED] IF (COUNTA(AH124, AI124, AJ124, AK124, AL124, AM124, AN124, AO124)) > 0, "Y", "" =

United Company Lois Clarke lclarke@unitedco.net 1005 Glenway Avenue Bristol VA 24201 IF (COUNTA(AH125, AI125, AJ125, AK125, AL125, AM125, AN125, AO125)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Fine, Lonnie Lonnie Fine I [REDACTED] 10 Fifth St Valley Stream NY 11581 IF (COUNTA(AH126, AI126, AJ126, AK126, AL126, AM126, AN126, AO126)) > 0, "Y", "" =

Lou Cortese Robertson prospect active [REDACTED] 191 Glen Rd Mountainside NJ 7092 IF (COUNTA(AH127, AI127, AJ127, AK127, AL127, AM127, AN127, AO127)) > 0, "Y", "" =

Zuckerberg, Lloyd Lloyd Zuckerberg C/P [REDACTED] IF (COUNTA(AH128, AI128, AJ128, AK128, AL128, AM128, AN128, AO128)) > 0, "Y", "" =

Stiritz, William P. Lynn Morgan [REDACTED] IF (COUNTA(AH129, AI129, AJ129, AK129, AL129, AM129, AN129, AO129)) > 0, "Y", "" = Sent 10/1 Sent 10/1

M20 Inc P [REDACTED] 515 South Figueroa Street, Suite 1050 Los Angeles CA 90071 Small operating businesses n/a Microcap activist w/ \$1-\$5mm EBITDA target 10% stakes sent 3/1. Passed 3/2 IF (COUNTA(AH130, AI130, AJ130, AK130, AL130, AM130, AN130, AO130)) > 0, "Y", "" =

Kristoff, Mark Mark Kristoff C/P [REDACTED] 825 Third Ave, 9th Fl New York NY 10022 IF (COUNTA(AH131, AI131, AJ131, AK131, AL131, AM131, AN131, AO131)) > 0, "Y", "" =

Klein, Martin Martin Klein C/P [REDACTED] 580 5th Ave, 5th Fl New York NY 10036 IF (COUNTA(AH132, AI132, AJ132, AK132, AL132, AM132, AN132, AO132)) > 0, "Y", "" =

Matt Ireland C/P [REDACTED] IF (COUNTA(AH133, AI133, AJ133, AK133, AL133, AM133, AN133, AO133)) > 0, "Y", "" =

EverWatch Financial Matt Womble P [REDACTED] 8 Sound Shore Drive, Suite 200 Greenwich CT 06830 General, due like industrial/agg services, oil & gas, environmental Maintain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML Send RESOF and Astra sent 8/12 sent 3/18. Passed 3/30 sent 3/16 IF (COUNTA(AH134, AI134, AJ134, AK134, AL134, AM134, AN134, AO134)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Barry, Mitchell Mitchell Barry C/P [REDACTED] 7 Penn Plaza, Suite 1400 New York NY 10001 IF (COUNTA(AH135, AI135, AJ135, AK135, AL135, AM135, AN135, AO135)) > 0, "Y", "" =

William McBride I [REDACTED] IF (COUNTA(AH136, AI136, AJ136, AK136, AL136, AM136, AN136, AO136)) > 0, "Y", "" =

Cline, Michael Michael Cline C/P [REDACTED] 51 Madison Ave, Fl 31 New York NY 10010 IF (COUNTA(AH137, AI137, AJ137, AK137, AL137, AM137, AN137, AO137)) > 0, "Y", "" =

Milton Cooper Janco lead inactive C/P [REDACTED] 3333 New Hyde Park Rd, Suite 100 New Hyde Park NY 11042 IF (COUNTA(AH138, AI138, AJ138, AK138, AL138, AM138, AN138, AO138)) > 0, "Y", "" =

Jesselson Capital Michael Jesselson Vrablic lead active P [REDACTED] .com 212-459-9600 130 Ave of America, Suite 4101 New York NY 10019 IF (COUNTA(AH139, AI139, AJ139, AK139, AL139, AM139, AN139, AO139)) > 0, "Y", "" =

Seelig, Mark Mark Seelig [REDACTED] IF (COUNTA(AH140, AI140, AJ140, AK140, AL140, AM140, AN140, AO140)) > 0, "Y", "" =

Georgetown U P [REDACTED] 1000 Potomac Street Suite 301 Washington DC 20007 General n/a Macro - send CIO materials regularly risk factors teaser sent 2/5 sent 3/16. Passed 3/19 IF (COUNTA(AH141, AI141, AJ141, AK141, AL141, AM141, AN141, AO141)) > 0, "Y", "" =

Mel Manion [REDACTED] IF (COUNTA(AH142, AI142, AJ142, AK142, AL142, AM142, AN142, AO142)) > 0, "Y", "" =

Matt Serra [REDACTED] IF (COUNTA(AH143, AI143, AJ143, AK143, AL143, AM143, AN143, AO143)) > 0, "Y", "" =

JL Squared Group [REDACTED] 2929 Arch Street, 13th Floor Philadelphia PA 19104 IF (COUNTA(AH144, AI144, AJ144, AK144, AL144, AM144, AN144, AO144)) > 0, "Y", "" =

Jain, Neil Neil Jain C/P [REDACTED] 158 Third St, PO Box 583 Mineola NY 11501 IF (COUNTA(AH145, AI145, AJ145, AK145, AL145, AM145, AN145, AO145)) > 0, "Y", "" =

Michael, Neal Neal Milch P [REDACTED] NY IF (COUNTA(AH146, AI146, AJ146, AK146, AL146, AM146, AN146, AO146)) > 0, "Y", "" =

Neil Blechman nsb2650@aol.com IF (COUNTA(AH147, AI147, AJ147, AK147, AL147, AM147, AN147, AO147)) > 0, "Y", "" =

Gaslow, Lawrence Peter Gaslow P [REDACTED] 105 Madison Ave, 15th Fl New York NY 10016 IF (COUNTA(AH148, AI148, AJ148, AK148, AL148, AM148, AN148, AO148)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Blue Mountain Peter Greatrex P [REDACTED]

280 Park Ave, 12th FL New York NY 10017 Sent 9/22 IF (COUNTA(AH149, AI149, AJ149, AK149, AL149, AM149, AN149, AO149)) > 0, "Y", "" =

Phillip Shefter C/P [REDACTED] IF (COUNTA(AH150, AI150, AJ150, AK150, AL150, AM150, AN150, AO150)) > 0, "Y", "" =

Edge [REDACTED] 1380 W. Paces Ferry Rd. Suite 1000 Atlanta GA 30327 IF (COUNTA(AH151, AI151, AJ151, AK151, AL151, AM151, AN151, AO151)) > 0, "Y", "" =

Laffont, Philippe Philippe Laffont P [REDACTED] 9 West 57th St New York NY 10019 IF (COUNTA(AH152, AI152, AJ152, AK152, AL152, AM152, AN152, AO152)) > 0, "Y", "" =

Yorktown Partners, LLC Peter Leidel P [REDACTED] NY IF (COUNTA(AH153, AI153, AJ153, AK153, AL153, AM153, AN153, AO153)) > 0, "Y", "" = Y Y Y N

Ehrenkraz, Pamela Pamela Ehrenkraz I [REDACTED] 51 West 52nd St New York NY 10019 IF (COUNTA(AH154, AI154, AJ154, AK154, AL154, AM154, AN154, AO154)) > 0, "Y", "" = Y Y

Robert Hull LaRoe lead active [REDACTED] TX IF (COUNTA(AH155, AI155, AJ155, AK155, AL155, AM155, AN155, AO155)) > 0, "Y", "" =

Parami Rahul Vaid P [REDACTED] 6 East 74th Street New York NY 10021 IF (COUNTA(AH156, AI156, AJ156, AK156, AL156, AM156, AN156, AO156)) > 0, "Y", "" = Y

Lewis Ranieri Sabbagh prospect active C/P [REDACTED] IF (COUNTA(AH157, AI157, AJ157, AK157, AL157, AM157, AN157, AO157)) > 0, "Y", "" = Y Y

Spruce Private Investors LLC P [REDACTED] 263 Tresser Blvd, 15th Floor Stamford CT 06901 Systematic gamma decay Trading with CS Introduce AFS or CB&S IF (COUNTA(AH158, AI158, AJ158, AK158, AL158, AM158, AN158, AO158)) > 0, "Y", "" =

Caruso, Richard Richard Caruso P [REDACTED] 795 E. Lancaster Avenue Suite 200 Villanova PA 19085 General, prefer funds or direct PE sent 7/28 IF (COUNTA(AH159, AI159, AJ159, AK159, AL159, AM159, AN159, AO159)) > 0, "Y", "" =

General Atlantic Family Office Rich Gold P [REDACTED] 3 Pickwick Plaza Greenwich CT 06830 IF (COUNTA(AH160, AI160, AJ160, AK160, AL160, AM160, AN160, AO160)) > 0, "Y", "" =

Illig, Cliff Robb Heineman P [REDACTED] 8900 State Line Road 5th Floor Leawood KS 66206 IF (COUNTA(AH161, AI161, AJ161, AK161, AL161, AM161, AN161, AO161)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Richard Merage Convey lead active richard.merage@falconig.com IF (COUNTA(AH162, AI162, AJ162, AK162, AL162, AM162, AN162, AO162)) > 0, "Y", "" =

Cold Spring Harbor Laboratory Richard Leeds P [REDACTED] 11 Harbor Park Dr Port Washington NY 11050 IF (COUNTA(AH163, AI163, AJ163, AK163, AL163, AM163, AN163, AO163)) > 0, "Y", "" = Y Y

Rich Joslin [REDACTED] IF (COUNTA(AH164, AI164, AJ164, AK164, AL164, AM164, AN164, AO164)) > 0, "Y", "" =

Larocca, Robert Robert Larocca I [REDACTED] 135 Crossways Park Drive Woodbury NY 11797 IF (COUNTA(AH165, AI165, AJ165, AK165, AL165, AM165, AN165, AO165)) > 0, "Y", "" = Y Y

Merage RMerage@migcap.com 660 Newport Center Drive. Suite 1300 Newport Beach CA 92660 Real Estate trading with the HF? Want intros to other family offices to grow internal HF teaser sent 1/23, follow up 8/12 on Blackrock DNC list sent 2/26 sent 3/16 IF (COUNTA(AH166, AI166, AJ166, AK166, AL166, AM166, AN166, AO166)) > 0, "Y", "" = Do not send research emails

CFM Rob P rob@cfmoffice.com 720 University Avenue, Suite 200 Los Gatos CA 95032 sent 2/26. Passed 2/26 Convey sending? IF (COUNTA(AH167, AI167, AJ167, AK167, AL167, AM167, AN167, AO167)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Meister, Robert Bob Meister robertmeister1@mac.com IF (COUNTA(AH168, AI168, AJ168, AK168, AL168, AM168, AN168, AO168)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Bulloch, Roger Roger Bulloch P [REDACTED] Las Vegas NV maybe as a seller? n/a Makes direct investments into pvt companies. 12-24m hold meeting sent 8/12 sent 3/1 IF (COUNTA(AH169, AI169, AJ169, AK169, AL169, AM169, AN169, AO169)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Ross Blechman [REDACTED] IF (COUNTA(AH170, AI170, AJ170, AK170, AL170, AM170, AN170, AO170)) > 0, "Y", "" =

Russell Artzt Convey lead active C/P [REDACTED] IF (COUNTA(AH171, AI171, AJ171, AK171, AL171, AM171, AN171, AO171)) > 0, "Y", "" = Y Y

Russell Blank [REDACTED] IF (COUNTA(AH172, AI172, AJ172, AK172, AL172, AM172, AN172, AO172)) > 0, "Y", "" =

Pensler, Sandy Sandy Pensler P [REDACTED] NY IF (COUNTA(AH173, AI173, AJ173, AK173, AL173, AM173, AN173, AO173)) > 0, "Y", "" = Y Y

Rose, Simon Simon Rose C/P [REDACTED] IF (COUNTA(AH174, AI174, AJ174, AK174, AL174, AM174, AN174, AO174)) > 0, "Y", "" = Y Y

Steven Blicht C/P [REDACTED] IF (COUNTA(AH175, AI175, AJ175, AK175, AL175, AM175, AN175, AO175)) > 0, "Y", "" = Y Y

Highlander Partners Stanley Bould P [REDACTED] 300 Crescent Court Suite 550 Dallas TX 75201 General puts on public equity? Poland, homebuilding and materials RESOF follow up sent 12/12 sent 3/1. Passed 3/30 sent 3/16. Passed 3/30 IF (COUNTA(AH176, AI176, AJ176, AK176, AL176, AM176, AN176, AO176)) > 0, "Y", "" = Sent 10/1 Sent 10/1

Anschutz [REDACTED] 555 Seventeenth Street, Suite 2400 Denver CO 80202 Telco, Rail, Oil&Gas, Sports/Entertainment, Lodging/Hospitality energy Do not want funds. Looking at experiential travel ideas meet w/ Scott in Denver sent 12/18 sent 3/18. Passed 4/1 IF (COUNTA(AH177, AI177, AJ177, AK177, AL177, AM177, AN177, AO177)) > 0, "Y", "" =

Infinity Q [REDACTED] 888 7th Avenue New York NY 10106 Real Estate, yield, esoteric multi-asset for Wildcat fund macro, vol? 20% IRR hurdle. Unconstrained. Size up to \$40mm with control. Structured and leverage ok sent 8/12 teaser sent 2/5 sent 3/1. Passed 3/30 sent 2/26. Passed 3/30 sent 3/16. Passed 3/30 IF (COUNTA(AH178, AI178, AJ178, AK178, AL178, AM178, AN178, AO178)) > 0, "Y", "" =

Dart Management P [REDACTED] Windward 3, Regatta Office Park Grand Cayman Cayman Islands KY1-1206 General, Biotech?, Pre-IPO mezz financing, MSBs MSBs? Deep value focus, lots of cash collateral, separate real estate group sent 12/18 teaser sent 2/5 IF (COUNTA(AH179, AI179, AJ179, AK179, AL179, AM179, AN179, AO179)) > 0, "Y", "" = N Do not send research emails

Makan, Divesh ICONIQ Capital LLC ICONIQ Capital LLC [REDACTED] 394 Pacific Ave, 2nd Floor San Francisco CA 94111 Credit n/a need to focus on unique solutions sent 12/18 sent 2/26 IF (COUNTA(AH180,AI180,AJ180,AK180,AL180,AM180,AN180,AO180))>0,"Y","")= Y Sent 9/14 Sent 9/14 Sent 9/14 Y

Sonny Jain C/P [REDACTED] IF (COUNTA(AH181,AI181,AJ181,AK181,AL181,AM181,AN181,AO181))>0,"Y","")= Y Y Sent 10/1 Sent 10/1

Thomson Stefan [REDACTED] 65 Queen Street West Suite 2400 Toronto ON, Canada M5H 2M8 IF (COUNTA(AH182,AI182,AJ182,AK182,AL182,AM182,AN182,AO182))>0,"Y","")= Sent 10/1 Sent 10/1

Arcus [REDACTED] 3060 Peachtree Rd. NW Suite 1880 Atlanta GA 30305 IF (COUNTA(AH183,AI183,AJ183,AK183,AL183,AM183,AN183,AO183))>0,"Y","")=

Arcus steve.sloan@arcuscp.com 3060 Peachtree Rd. NW Suite 1880 Atlanta GA 30305 IF (COUNTA(AH184,AI184,AJ184,AK184,AL184,AM184,AN184,AO184))>0,"Y","")=

Brandis, Steve Steve Brandis [REDACTED] 215 W 40th St, 10th Fl New York NY 10018 IF (COUNTA(AH185,AI185,AJ185,AK185,AL185,AM185,AN185,AO185))>0,"Y","")=

Danziger, Thomas Thomas Danziger I [REDACTED] 405 Park Ave New York NY 10022 IF (COUNTA(AH186,AI186,AJ186,AK186,AL186,AM186,AN186,AO186))>0,"Y","")= Y Y

Meister, Todd Todd Meister P [REDACTED] IF (COUNTA(AH187,AI187,AJ187,AK187,AL187,AM187,AN187,AO187))>0,"Y","")= Y Y

Murray, Thomas Thomas Murray I [REDACTED] IF (COUNTA(AH188,AI188,AJ188,AK188,AL188,AM188,AN188,AO188))>0,"Y","")= Y Y

Todd Angkatavanich I [REDACTED] IF (COUNTA(AH189,AI189,AJ189,AK189,AL189,AM189,AN189,AO189))>0,"Y","")= Y

Archer, Thomas J. Thomas Archer I [REDACTED] 90 Park Ave New York NY 10016 IF (COUNTA(AH190,AI190,AJ190,AK190,AL190,AM190,AN190,AO190))>0,"Y","")= Y Y

CFM Tim Sarhatt P [REDACTED] 720 University Avenue, Suite 200 Los Gatos CA 95032 sent 2/26. Passed 2/26 Convey sending? IF (COUNTA(AH191,AI191,AJ191,AK191,AL191,AM191,AN191,AO191))>0,"Y","")= Sent 10/1 Sent 10/1

BBR Partners Todd Whiteneck P [REDACTED] 140 E. 45th Street, 26th Floor New York NY 10017 Energy, EM, funds on Blackrock DNC list sent 3/16. Passed 3/24 IF (COUNTA(AH192,AI192,AJ192,AK192,AL192,AM192,AN192,AO192))>0,"Y","")= y

EverWatch Financial Tyler Webb P [REDACTED] 8 Sound Shore Drive, Suite 200 Greenwich CT 06830 General, but like industrial/agg services, oil & gas, environmental Maintain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML Send RESOF and Astra sent 8/12 sent 3/18. Passed 3/30 sent 3/16 IF (COUNTA(AH193,AI193,AK193,AL193,AM193,AN193,AO193))>0,"Y","")=

Cox, Berry Cox Partners P [REDACTED] 2100 McKinney Ave, Suite 1700 Dallas TX 75201 IF (COUNTA(AH194,AI194,AJ194,AK194,AL194,AM194,AN194,AO194))>0,"Y","")=

Edge [REDACTED] 1380 W. Paces Ferry Rd. Suite 1000 Atlanta GA 30327 IF (COUNTA(AH195,AI195,AJ195,AK195,AL195,AM195,AN195,AO195))>0,"Y","")=

Stiritz, William P. William Stiritz P [REDACTED] 835 S 8th St St. Louis MO 63102 IF (COUNTA(AH196,AI196,AJ196,AK196,AL196,AM196,AN196,AO196))>0,"Y","")=

Amster, Yosi Yosi Amster I [REDACTED] 340 Madison Ave, 21st Fl New York NY 10173 IF (COUNTA(AH197,AI197,AJ197,AK197,AL197,AM197,AN197,AO197))>0,"Y","")= Y Y

Catherine Moreatis C/P IF (COUNTA(AH198,AI198,AJ198,AK198,AL198,AM198,AN198,AO198))>0,"Y","")= Y Y

Glickman, Donald Don Glickman P IF (COUNTA(AH199,AI199,AJ199,AK199,AL199,AM199,AN199,AO199))>0,"Y","")=

Weiss, George George Weiss P Hartford CT IF (COUNTA(AH200,AI200,AJ200,AK200,AL200,AM200,AN200,AO200))>0,"Y","")= Y Y Y N

James Alterbaum I IF (COUNTA(AH201,AI201,AJ201,AK201,AL201,AM201,AN201,AO201))>0,"Y","")= Y

John Binko C/P IF (COUNTA(AH202,AI202,AJ202,AK202,AL202,AM202,AN202,AO202))>0,"Y","")= Y

Annandale Capital P 325 North St. Paul Street Suite 3500 Dallas TX 75201 General. Funds easier, but comfortable with direct PE n/a RIN, RESOF, Suntex, Astra follow up sent 3/20. May have interest in second close sent 3/20 sent 3/1 sent 3/24 IF (COUNTA(AH203,AI203,AJ203,AK203,AL203,AM203,AN203,AO203))>0,"Y","")=

Granite Group P 187 Danbury Road Wilton CT 06897 General open to funds meeting in NYC sent 3/16 IF (COUNTA(AH204,AI204,AJ204,AK204,AL204,AM204,AN204,AO204))>0,"Y","")=

Makena Capital Management P 2755 Sand Hill Rd, Suite 200 Menlo Park CA 94025 Risk factors met 2/2 NDA and portfolio analysis IF (COUNTA(AH205,AI205,AJ205,AK205,AL205,AM205,AN205,AO205))>0,"Y","")=

Mariner Capital P 485 Lexington Ave, 28th Fl New York NY Risk factors met 11/21 Looking at various solutions across the street, all from IB providers Send white papers IF (COUNTA(AH206,AI206,AJ206,AK206,AL206,AM206,AN206,AO206))>0,"Y","")=

Peregrine Group P 214-231-6800 2101 Cedar Springs Rd, Suite 1800 Dallas TX 75201 Energy n/a covered by brokers already for public markets trading mineral rights in Permian mentioned 12/4 mentioned 12/4 sent 3/1 IF (COUNTA(AH207,AI207,AJ207,AK207,AL207,AM207,AN207,AO207))>0,"Y","")=

IF (COUNTA(AH208,AI208,AJ208,AK208,AL208,AM208,AN208,AO208))>0,"Y","")=

IF (COUNTA(AH209,AI209,AJ209,AK209,AL209,AM209,AN209,AO209))>0,"Y","")=

IF (COUNTA (AH210, AI210, AJ210, AK210, AL210, AM210, AN210, AO210) > 0, "Y", "") =
For internal use only

Paul Contacts									
First Name	Last Name	Messaging ID	CIO Outlook	Tax Topics	Intermediary	Clie			
nt/Prospect	Intermediary	Client/Prospect							
Arun	Alagappan		Y	Y	0	C/P	IF (H2="I", "I", IF (I2="C/P", "C/P", "NA"))=C/P		
James	Alterbaum	Y	Y	I	0		IF (H3="I", "I", IF (I3="C/P", "C/P", "NA"))=I		
Yosi	Amster		Y	Y	Y	I	0	IF (H4="I", "I", IF (I4="C/P", "C/P", "NA"))=I	
Todd	Angkatavanich			Y	Y	I	0	IF (H5="I", "I", IF (I5="C/P", "C/P", "NA"))=I	
David	Angstreich		0	0	IF (H6="I", "I", IF (I6="C/P", "C/P", "NA"))=NA				
Thomas	Archer		Y	Y	I	0	IF (H7="I", "I", IF (I7="C/P", "C/P", "NA"))=I		
Russell	Artzt		Y	Y	0	C/P	IF (H8="I", "I", IF (I8="C/P", "C/P", "NA"))=C/P		
Eric	Attias		0	IF (H9="I", "I", IF (I9="C/P", "C/P", "NA"))=NA					
Gregory	Attorri		Y	Y	Y	I	0	IF (H10="I", "I", IF (I10="C/P", "C/P", "NA"))=I	
Andy	Augenblick			0	0	IF (H11="I", "I", IF (I11="C/P", "C/P", "NA"))=NA			
Dill	Ayres			IF (H12="I", "I", IF (I12="C/P", "C/P", "NA"))=NA					
John	Barber		Y	Y	Y	I	0	IF (H13="I", "I", IF (I13="C/P", "C/P", "NA"))=I	
Mitchell	Barry	mbarry@centuryny.com	Y	Y	Y	0	C/P	IF (H14="I", "I", IF (I14="C/P", "C/P", "NA"))=C/P	
Harry	Beller		Y	Y	0	C/P	IF (H15="I", "I", IF (I15="C/P", "C/P", "NA"))=C/P		
Joakim	Bergander			0	0	IF (H16="I", "I", IF (I16="C/P", "C/P", "NA"))=NA			
William	Berkman		0	0	IF (H17="I", "I", IF (I17="C/P", "C/P", "NA"))=NA				
Ajay	Bhalla		Y	Y	0	C/P	IF (H18="I", "I", IF (I18="C/P", "C/P", "NA"))=C/P		
John	Binko	Y	Y	Y	0	C/P	IF (H19="I", "I", IF (I19="C/P", "C/P", "NA"))=C/P		
Russell	Blank		0	0	IF (H20="I", "I", IF (I20="C/P", "C/P", "NA"))=NA				
Brian	Blechman		Y	Y	Y	0	C/P	IF (H21="I", "I", IF (I21="C/P", "C/P", "NA"))=C/P	
Neil	Blechman		0	IF (H22="I", "I", IF (I22="C/P", "C/P", "NA"))=NA					
Ross	Blechman		0	0	IF (H23="I", "I", IF (I23="C/P", "C/P", "NA"))=NA				
Steven	Blicht			Y	Y	Y	0	C/P	IF (H24="I", "I", IF (I24="C/P", "C/P", "NA"))=C/P
Barry	Bloom		0	0	IF (H25="I", "I", IF (I25="C/P", "C/P", "NA"))=NA				
Jonathon	Botwinick		Y	Y	Y	0	C/P	IF (H26="I", "I", IF (I26="C/P", "C/P", "NA"))=C/P	
Steve	Brandis		0	0	IF (H27="I", "I", IF (I27="C/P", "C/P", "NA"))=NA				
Charles	Britton		Y	Y	Y	0	C/P	IF (H28="I", "I", IF (I28="C/P", "C/P", "NA"))=C/P	
Cary	Brody			Y	Y	Y	0	C/P	IF (H29="I", "I", IF (I29="C/P", "C/P", "NA"))=C/P
Lara	Brody			0	0	IF (H30="I", "I", IF (I30="C/P", "C/P", "NA"))=NA			
Louis	Cailoa		0	0	IF (H31="I", "I", IF (I31="C/P", "C/P", "NA"))=NA				
Adreinne	Cannella			0	0	IF (H32="I", "I", IF (I32="C/P", "C/P", "NA"))=NA			
Michael	Cline		Y	Y	0	C/P	IF (H33="I", "I", IF (I33="C/P", "C/P", "NA"))=C/P		
Gail	Coleman		Y	Y	Y	0	C/P	IF (H34="I", "I", IF (I34="C/P", "C/P", "NA"))=C/P	
Caroline	Conegliano			Y	Y	Y	I	0	IF (H35="I", "I", IF (I35="C/P", "C/P", "NA"))=I
Curtis	Conway		Y	Y	0	C/P	IF (H36="I", "I", IF (I36="C/P", "C/P", "NA"))=C/P		
David	Cooper		Y	Y	0	C/P	IF (H37="I", "I", IF (I37="C/P", "C/P", "NA"))=C/P		
Milton	Cooper		Y	Y	0	C/P	IF (H38="I", "I", IF (I38="C/P", "C/P", "NA"))=C/P		
Jeffrey	Coopersmith		Y	Y	Y	I	0	IF (H39="I", "I", IF (I39="C/P", "C/P", "NA"))=I	
Lou	Cortese		0	0	IF (H40="I", "I", IF (I40="C/P", "C/P", "NA"))=NA				
Jonathan	Crystal		Y	Y	Y	I	0	IF (H41="I", "I", IF (I41="C/P", "C/P", "NA"))=I	
Thomas	Danziger		Y	Y	Y	I	0	IF (H42="I", "I", IF (I42="C/P", "C/P", "NA"))=I	
David	Deutsch		0	0	IF (H43="I", "I", IF (I43="C/P", "C/P", "NA"))=NA				
Brooks	Duncan		Y	Y	I	0	IF (H44="I", "I", IF (I44="C/P", "C/P", "NA"))=I		
Kristen	Dzialga		0	0	IF (H45="I", "I", IF (I45="C/P", "C/P", "NA"))=NA				

Pamela Ehrenkranz			Y	Y	Y	I	0	IF (H46="I", "I", IF (I46="C/P", "C/P", "NA"))=I
Charles Falk		Y	Y	Y	I	0	IF (H47="I", "I", IF (I47="C/P", "C/P", "NA"))=I	
Andrew Farkas		0	0	IF (H48="I", "I", IF (I48="C/P", "C/P", "NA"))=NA				
Lonnie Fine		Y	Y	Y	I	0	IF (H49="I", "I", IF (I49="C/P", "C/P", "NA"))=I	
John Fitzgibbons		Y	Y	Y	0	C/P	IF (H50="I", "I", IF (I50="C/P", "C/P", "NA"))=C/P	
Peter Gaslow		Y	Y	Y	0	C/P	IF (H51="I", "I", IF (I51="C/P", "C/P", "NA"))=C/P	
Edouard Gerschel		Y	Y	Y	0	C/P	IF (H52="I", "I", IF (I52="C/P", "C/P", "NA"))=C/P	
Ari Glass		Y	Y	Y	0	C/P	IF (H53="I", "I", IF (I53="C/P", "C/P", "NA"))=C/P	
Don Glickman		0	0	IF (H54="I", "I", IF (I54="C/P", "C/P", "NA"))=NA				
Rich Gold		0	0	IF (H55="I", "I", IF (I55="C/P", "C/P", "NA"))=NA				
Christopher Goldberg		0	0	IF (H56="I", "I", IF (I56="C/P", "C/P", "NA"))=NA				
Peter Greatrex		0	0	IF (H57="I", "I", IF (I57="C/P", "C/P", "NA"))=NA				
Bruce Gross		Y	Y	Y	0	C/P	IF (H58="I", "I", IF (I58="C/P", "C/P", "NA"))=C/P	
Robert Haier		Y	Y	Y	0	C/P	IF (H59="I", "I", IF (I59="C/P", "C/P", "NA"))=C/P	
David Halliwill		Y	Y	Y	0	C/P	IF (H60="I", "I", IF (I60="C/P", "C/P", "NA"))=C/P	
Ira Halperin		Y	Y	Y	I	0	IF (H61="I", "I", IF (I61="C/P", "C/P", "NA"))=I	
Cathy Handley		Y	Y	Y	0	C/P	IF (H62="I", "I", IF (I62="C/P", "C/P", "NA"))=C/P	
Daniel Heflin		Y	Y	Y	0	C/P	IF (H63="I", "I", IF (I63="C/P", "C/P", "NA"))=C/P	
Heidi Holterbosch		Y	Y	Y	0	C/P	IF (H64="I", "I", IF (I64="C/P", "C/P", "NA"))=C/P	
Robert Hull		0	0	IF (H65="I", "I", IF (I65="C/P", "C/P", "NA"))=NA				
Matt Ireland		Y	Y	Y	0	C/P	IF (H66="I", "I", IF (I66="C/P", "C/P", "NA"))=C/P	
Sonny Jain		Y	Y	Y	0	C/P	IF (H67="I", "I", IF (I67="C/P", "C/P", "NA"))=C/P	
Neil Jain		Y	Y	Y	0	C/P	IF (H68="I", "I", IF (I68="C/P", "C/P", "NA"))=C/P	
Michael Jesselson		0	0	IF (H69="I", "I", IF (I69="C/P", "C/P", "NA"))=NA				
Ken Jones		0	0	IF (H70="I", "I", IF (I70="C/P", "C/P", "NA"))=NA				
Rich Joslin		0	0	IF (H71="I", "I", IF (I71="C/P", "C/P", "NA"))=NA				
William Keenan		Y	Y	Y	0	C/P	IF (H72="I", "I", IF (I72="C/P", "C/P", "NA"))=C/P	
William Howard Keenan		0	0	IF (H73="I", "I", IF (I73="C/P", "C/P", "NA"))=NA				
Judy Kelly		Y	Y	Y	0	C/P	IF (H74="I", "I", IF (I74="C/P", "C/P", "NA"))=C/P	
Avi Kestenbaum		Y	Y	Y	0	C/P	IF (H75="I", "I", IF (I75="C/P", "C/P", "NA"))=C/P	
Adam Kimmel		Y	Y	Y	0	C/P	IF (H76="I", "I", IF (I76="C/P", "C/P", "NA"))=C/P	
Jeff Kirwood		0	0	IF (H77="I", "I", IF (I77="C/P", "C/P", "NA"))=NA				
Martin Klein		Y	Y	Y	0	C/P	IF (H78="I", "I", IF (I78="C/P", "C/P", "NA"))=C/P	
Mark Kristoff		Y	Y	Y	0	C/P	IF (H79="I", "I", IF (I79="C/P", "C/P", "NA"))=C/P	
Charles Krusen		Y	Y	Y	0	C/P	IF (H80="I", "I", IF (I80="C/P", "C/P", "NA"))=C/P	
Alan Kufeld		Y	Y	I	0	IF (H81="I", "I", IF (I81="C/P", "C/P", "NA"))=I		
Philippe Laffont		0	0	IF (H82="I", "I", IF (I82="C/P", "C/P", "NA"))=NA				
Robert Larocca		Y	Y	I	0	IF (H83="I", "I", IF (I83="C/P", "C/P", "NA"))=I		
Bryan H. Lawrence		0	0	IF (H84="I", "I", IF (I84="C/P", "C/P", "NA"))=NA				
Bryan R. Lawrence		0	0	IF (H85="I", "I", IF (I85="C/P", "C/P", "NA"))=NA				
Richard Leeds		Y	Y	Y	0	C/P	IF (H86="I", "I", IF (I86="C/P", "C/P", "NA"))=C/P	
Peter Leidel		Y	Y	Y	0	C/P	IF (H87="I", "I", IF (I87="C/P", "C/P", "NA"))=C/P	
Jared Levy		Y	Y	Y	I	0	IF (H88="I", "I", IF (I88="C/P", "C/P", "NA"))=I	

John Lummis			Y	Y	Y	0	C/P	IF (H89="I", "I", IF (I89="C/P", "C/P", "NA"))=C/P
Gene Lynch						0		IF (H90="I", "I", IF (I90="C/P", "C/P", "NA"))=NA
Mel Manion			0	0				IF (H91="I", "I", IF (I91="C/P", "C/P", "NA"))=NA
David Manlowe						0		IF (H92="I", "I", IF (I92="C/P", "C/P", "NA"))=NA
Bryce Markus						0		IF (H93="I", "I", IF (I93="C/P", "C/P", "NA"))=NA
Kelly Masuda						0		IF (H94="I", "I", IF (I94="C/P", "C/P", "NA"))=NA
William McBride			Y	Y	Y	I	0	IF (H95="I", "I", IF (I95="C/P", "C/P", "NA"))=I
Todd Meister			Y	Y	Y	0	C/P	IF (H96="I", "I", IF (I96="C/P", "C/P", "NA"))=C/P
Richard Merage						0		IF (H97="I", "I", IF (I97="C/P", "C/P", "NA"))=NA
Neal Milch			Y	Y	Y	0	C/P	IF (H98="I", "I", IF (I98="C/P", "C/P", "NA"))=C/P
David Mitchell						0		IF (H99="I", "I", IF (I99="C/P", "C/P", "NA"))=NA
Erik Moody			0	0				IF (H100="I", "I", IF (I100="C/P", "C/P", "NA"))=NA
Catherine Moreatis			Y	Y	Y	0	C/P	IF (H101="I", "I", IF (I101="C/P", "C/P", "NA"))=C/P
Gary Moriwaki						Y	Y	IF (H102="I", "I", IF (I102="C/P", "C/P", "NA"))=I
Thomas Murray			Y	Y	I	0		IF (H103="I", "I", IF (I103="C/P", "C/P", "NA"))=I
Alvin Murstein						Y	Y	IF (H104="I", "I", IF (I104="C/P", "C/P", "NA"))=C/P
Andrew Murstein			Y	Y	Y	0	C/P	IF (H105="I", "I", IF (I105="C/P", "C/P", "NA"))=C/P
Anup Patel			0	0				IF (H106="I", "I", IF (I106="C/P", "C/P", "NA"))=NA
Sandy Pensler						Y	Y	IF (H107="I", "I", IF (I107="C/P", "C/P", "NA"))=C/P
Anthony Persico						0		IF (H108="I", "I", IF (I108="C/P", "C/P", "NA"))=NA
George Petrides						Y	Y	IF (H109="I", "I", IF (I109="C/P", "C/P", "NA"))=I
Deepak Raj			0	0				IF (H110="I", "I", IF (I110="C/P", "C/P", "NA"))=NA
Lewis Ranieri			Y	Y	Y	0	C/P	IF (H111="I", "I", IF (I111="C/P", "C/P", "NA"))=C/P
Ben Rechler			0	0				IF (H112="I", "I", IF (I112="C/P", "C/P", "NA"))=NA
Julie Richardson						Y	Y	IF (H113="I", "I", IF (I113="C/P", "C/P", "NA"))=C/P
Colby Rollins			Y	Y	Y	0	C/P	IF (H114="I", "I", IF (I114="C/P", "C/P", "NA"))=C/P
Simon Rose			Y	Y	Y	0	C/P	IF (H115="I", "I", IF (I115="C/P", "C/P", "NA"))=C/P
Kevin Ryan			Y	Y	Y	0	C/P	IF (H116="I", "I", IF (I116="C/P", "C/P", "NA"))=C/P
Marla Schaefer						Y	Y	IF (H117="I", "I", IF (I117="C/P", "C/P", "NA"))=C/P
Karl Schreiber						0		IF (H118="I", "I", IF (I118="C/P", "C/P", "NA"))=NA
Mark Seelig			0					IF (H119="I", "I", IF (I119="C/P", "C/P", "NA"))=NA
Matt Serra			0	0				IF (H120="I", "I", IF (I120="C/P", "C/P", "NA"))=NA
Phillip Shefter						Y	Y	IF (H121="I", "I", IF (I121="C/P", "C/P", "NA"))=C/P
Richard Simon			Y	Y	Y	0	C/P	IF (H122="I", "I", IF (I122="C/P", "C/P", "NA"))=C/P
Jamie Smith			0	0				IF (H123="I", "I", IF (I123="C/P", "C/P", "NA"))=NA
Inder Sodhi			Y	Y	Y	0	C/P	IF (H124="I", "I", IF (I124="C/P", "C/P", "NA"))=C/P
John Straus						0		IF (H125="I", "I", IF (I125="C/P", "C/P", "NA"))=NA
Haresh Tharani						Y	Y	IF (H126="I", "I", IF (I126="C/P", "C/P", "NA"))=C/P
Brad Wechsler						0		IF (H127="I", "I", IF (I127="C/P", "C/P", "NA"))=NA
George Weiss	Y	Y	Y	0	C/P			IF (H128="I", "I", IF (I128="C/P", "C/P", "NA"))=C/P
Andrew Zaro			0	0				IF (H129="I", "I", IF (I129="C/P", "C/P", "NA"))=NA
Alex Zubillaga						Y	Y	IF (H130="I", "I", IF (I130="C/P", "C/P", "NA"))=C/P

130="I","I",IF(I130="C/P","C/P","NA"))=C/P
Lloyd Zuckerberg [REDACTED] Y Y Y 0 C/P IF(H131="I",
"I",IF(I131="C/P","C/P","NA"))=C/P
Kristin [REDACTED] Y Y Y 0 C/P IF(H132="I","I",IF(I
132="C/P","C/P","NA"))=C/P
For internal use only

Client/ Prospect	Email Address	City	State	Zip		
Alex Green	[REDACTED]	911 Carriage Way	Southlake	TX	76092	
Annandale	[REDACTED]	325 North St. Paul Street Suite 3500	Dallas	TX	75201	
Anschutz 80202	[REDACTED]	555 Seventeenth Street, Suite 2400	Denver	CO		
Arcus	[REDACTED]	3060 Peachtree Rd. NW Suite 1880	Atlanta	GA	30305	
Arcus 5	[REDACTED]	3060 Peachtree Rd. NW Suite 1880	Atlanta	GA	3030	
BBR 7	[REDACTED]	140 E. 45th Street, 26th Floor	New York	NY	1001	
Blank	[REDACTED]	3223 Howell Mill Road, Northwest	Atlanta	GA	30347	
Bluestem 22902	[REDACTED]	212 E. Main Street, Suite 201	Charlottesville	VA		
Bright Group	[REDACTED]	200 Greenbrier Road	Summersville	WV	26651	
Caruso Affiliated 90036	[REDACTED]	101 The Grove Drive	Los Angeles	CA		
Caruso (Richard) PA 19085	[REDACTED]	795 E. Lancaster Avenue Suite 200	Villanova			
Caruso (Richard) anova PA 19085	[REDACTED]	795 E. Lancaster Avenue Suite 200	Villanova			
CFM 2	[REDACTED]	720 University Avenue, Suite 200	Los Gatos	CA	9503	
CFM 2	[REDACTED]	720 University Avenue, Suite 200	Los Gatos	CA	9503	
Cox	[REDACTED]	2100 McKinney Ave, Suite 1700	Dallas	TX	75201	
Dock Street 19406	[REDACTED]	510 Fehelley Drive	King of Prussia	PA		
Donabedian 0	[REDACTED]	200 Technecenter Drive, Suite 200	Milford	OH	4515	
Dorrance Dorrance	[REDACTED]					
Duncan Edge 7	[REDACTED]	00 Louisiana Street, Suite 5200	Houston	TX	77002	
Edge 7	[REDACTED]	1380 W. Paces Ferry Rd. Suite 1000	Atlanta	GA	3032	
Edge 7	[REDACTED]	1380 W. Paces Ferry Rd. Suite 1000	Atlanta	GA	3032	
Edge 7	[REDACTED]	1380 W. Paces Ferry Rd. Suite 1000	Atlanta	GA	3032	
Essig	[REDACTED]	174 Nassau Street #320	Princeton	NJ	08542	
Everwatch 06830	[REDACTED]	8 Sound Shore Drive, Suite 200	Greenwich	CT		
Everwatch 06830	[REDACTED]	8 Sound Shore Drive, Suite 200	Greenwich	CT		
Everwatch 0	[REDACTED]	8 Sound Shore Drive, Suite 200	Greenwich	CT	0683	
Ford	[REDACTED]	200 Crescent Court Suite 1365	Dallas	TX	75021	
Forrestal	[REDACTED]	1450 Brickell Avenue	Miami	FL	33131	
Forrestal	[REDACTED]	1450 Brickell Avenue	Miami	FL	33131	
Georgetown 7	[REDACTED]	Potomac Street Suite 301	Washington	DC	2000	
Glenmede PA 19103	[REDACTED]	1650 Market Street Suite 1200	Philadelphia			
Granite Group	[REDACTED]	187 Danbury Road	Wilton	CT	06897	
Guilford	[REDACTED]	P.O. Box 13439	Richmond	VA	23225	
Highlander 1	[REDACTED]	300 Crescent Court Suite 550	Dallas	TX	7520	
Hillspire 5	[REDACTED]	1010 El Camino Real, Suite 200	Menlo Park	CA	9402	
Hillspire 5	[REDACTED]	1010 El Camino Real, Suite 200	Menlo Park	CA	9402	
Iconiq	[REDACTED]	394 Pacific Ave, 2nd Floor	San Francisco	CA	94111	
Iconiq	[REDACTED]	394 Pacific Ave, 2nd Floor	San Francisco	CA	94111	
Iconiq	[REDACTED]	394 Pacific Ave, 2nd Floor	San Francisco	CA	94111	
Illig	[REDACTED]	8900 State Line Road 5th Floor	Leawood	KS	66206	
Infinity Q	[REDACTED]	7th Avenue	New York	NY	10106	
Infinity Q	[REDACTED]	7th Avenue	New York	NY	10106	
Ironsides	[REDACTED]	Tarrytown Center	Rocky Mount	NC	27804	
JL squared 19104	[REDACTED]	2929 Arch Street, 13th Floor	Philadelphia	PA		
JL squared 19104	[REDACTED]	2929 Arch Street, 13th Floor	Philadelphia	PA		
Lindemann m20 90071	[REDACTED]	515 South Figueroa Street, Suite 1050	Los Angeles	CA		
Nicholas 6	[REDACTED]	15 Enterprise, Ste. 550	Aliso Viejo	CA	9265	
Nicholas	[REDACTED]					

Orix	[REDACTED]	1717 Main Street, Suite 1100	Dallas TX	75201	
Parami	[REDACTED]	6 East 74th Street	New York NY	10021	
Parami	[REDACTED]	6 East 74th Street	New York NY	10021	
Roger Bulloch	[REDACTED]	Las Vegas	NV		
Shamrock	[REDACTED]	3500 W. Olive Avenue, Suite 700	Burbank CA	91505	
Slome	[REDACTED]	150 East 58th Street, 34th Floor	New York		NY
10155	[REDACTED]				
Slome	[REDACTED]	150 East 58th Street, 34th Floor	New York		NY
10155	[REDACTED]				
Snyder	[REDACTED]	11900 River Road	Potomac MD	20854	
Sonen Capital	[REDACTED]	50 Osgood Place, Ste. 320	San Francisco CA		9413
3	[REDACTED]				
Sonen Capital	[REDACTED]	m 50 Osgood Place, Ste. 320	San Francisco CA		
94133	[REDACTED]				
Spruce	[REDACTED]	263 Tresser Blvd, 15th Floor	Stamford CT		0690
1	[REDACTED]				
Spruce	[REDACTED]	263 Tresser Blvd, 15th Floor	Stamford CT		0690
1	[REDACTED]				
Stiritz	[REDACTED]				
Stiritz	[REDACTED]				
Thomson	[REDACTED]	65 Queen Street West Suite 2400	Toronto ON, Canada		M5H 2M8
True North	[REDACTED]	8350 N. Central Expressway, Ste. 725			Dall
as	TX	75208			
United Company	[REDACTED]	1005 Glenway Avenue	Bristol VA	24201	
Willett	[REDACTED]	New York	NY		
DO NOT SEND:	[REDACTED]				
Merage	[REDACTED]	660 Newport Center Drive. Suite 1300	Newport Beach CA		9266
0	[REDACTED]				
DART	[REDACTED]	Windward 3, Regatta Office Park	Grand Cayman		Cayman Islan
ds	KY1-1206				

Notes 10.15

Relationship Name	First	Last	Email	JPM Twin-Win	SPX	MS Accelerated Return
n SPX/RTY	MS Accelerated Return	EuroStoxx 50		MS Accelerated return	SPX	MS Phoenix A
utoCall AAPL	CS Digital		SPX/RTY	CS Digital	EuroStoxx 50	JPM
12M AutoCall	SPX/RTY	JPM 15M	AutoCall	SPX/RTY		
Forrestal Capital	Annette	Franqui				
SK Family Office	Charles	Britton				
Ironsides AM						
Forrestal Capital	Jonathan					
Snyder, Daniel	Karl	Schreiber				
Makan, Divesh	ICONIQ	Capital LLC				