

Clients+Products													
Contact Information	KCP	AFS	Structured Notes	Periodic communication	Events/	Ente							
rtainment													
General Information	Current Offerings			General Current Offerings			September Offerings						
Relationship Name	Family	Office	Name	First	Last	Claimed?	C/P/I	Email	Phon				
Address	City	State	Zip	Private	Markets	Focus	Capital	Markets	Focus	Research	Foc		
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	Plus	(9/25)	MS	Apple	Autocall	(9/18)	MS	Crude	Oil	Autocall	(9/14)	HSBC
SX5E	Buffered	Accelerated	Return	(9/24)	CS	XOP	Accelerated	Return	Barrier	(9/18)	CS	S	
PX	Callable	(9/25)	JP	SPX	Twin	Win	(9/25)	CIO	View	Tax	Topics	Structured	Notes
Other	Interests	Frieze	London	(2015)	Invite	Invite	Sent/	response					
Algappan, Arun	Arun	Alagappan	P									210 East 86th St, Su	
ite 601 New York		NY	10028	Y	Y								
James Alterbaum		I	Y										
Amster, Yosi	Yosi	Amster	I									340 Madison	
Ave, 21st Fl	New York	NY	10173	Y	Y								
EverWatch Financial		Frohman	Anderson	P								8 Sound Shor	
Drive, Suite 200		Greenwich	CT	06830									
oil & gas, enviromental		Maintain	lvq. 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	
Todd	Angkatavanich	I										Y	
David	Angstreich												
Archer, Thomas J.	Thomas	Archer	I									90 Park Ave	
New York	NY	10016	Y	Y									
Russell Artzt	Convey	lead	active	C/P									
Eric Attias													
family exposure)	or	HF's	Former	US	CEO	of	Soc	Gen	AM.	Knows	Stephane	Farouze	But
er sent 2/5	sent	2/26											no
Attori, Gregory	Gregory	Attorri	I									485 Park Ave, Suite 4B	New
York	NY	10022	Y	Y									
Augenblick, Andy	Andy	Augenblick											
730 Park Ave	New York	NY	10021										
Cold Spring Harbor Laboratory		Dill	Ayres	P								1 Bungtown R	
d	Cold Spring Harbor	NY	11724										
John Barber	Sohrab	prospect	inactive	I								Y	Y
Barry, Mitchell	Mitchell	Barry	C/P									7 Penn Plaza	
, Suite 1400	New York	NY	10001	Y	Y								
Beller, Harry	Harry	Beller	C/P									12 Golar Dr	Monsey
2	Y	Y										NY	1095
Wanek, Todd	Thirdlake	Capital											
William Berkman	Convey	lead	active									650 Madison Ave	New York
10022													NY
Bhalla, Ajay	Ajay	Bhalla	P									Y	Y
John Binko	C/P	Y	Y										
Russell Blank													
Brian Blechman	C/P											Y	Y
Neil Blechman													
Ross Blechman													
Steven Blicht	C/P											Y	Y
Barry Bloom	McCarthy	prospect	active									655 Madison Ave	New
York	NY	10021											
Jonathon	Botwinick	C/P										Y	Y
Brandis, Steve	Steve	Brandis										215 W 40th St, 10th	
Fl	New York	NY	10018										
SK Family Office		Charles	Britton	P								Sent 9/11	Sent
9/11- Interested	Sent	9/11	Sent	9/11	Y	Y	Y						
Cary Brody	C/P											Y	Y
Lara Brody													
Bulloch, Roger	Roger	Bulloch	P									Las Vegas	NV
eller? n/a	Makes	direct	investments	into	pvt	companies.	12-24m	hold					maybe
sent 3/1													as
Louis Cailoa													
Cross, Lisa	Adreinne	Cannella	P										300
Old Country Rd,	Suite	351	Mineola	NY	11510								
Caruso, Richard	Richard	Caruso	P									795 E. Lancaster Avenue	Suite
Villanova	PA	19085											200
Caruso, Richard	Richard	Caruso	P									795 E. Lancaster Avenue	Suit
e 200	Villanova	PA	19085										
Schmidt, Eric	Hillspire	LLC	Chuck	Chai	P	cchai@hillspire.com						1010 El Camino Real,	
Suite 200	Menlo Park	CA	94025										
rophy assets.	Want	co-invest	multi-asset.	FX	and	rates	hedging					looking	at
urope.	Could	use	tax	shield	against	GOOG	share	sales	RESOF,	Extel.	Set	up	ISDA.
er sent 11/12,	follow	up	1/5,	8/12	teaser	sent	2/5	sent	3/1	sent	2/24.	passed	3/27
3/16	Sent	9/14											
Cline, Michael	Michael	Cline	C/P									51 Madison Ave, Fl 3	
1	New York	NY	10010	Y	Y								
Coleman, Gail	Gail	Coleman	P										
n Ave, Fl 71	New York	NY	10174	Y	Y							405 Lexington	

Caroline	Conegliano	I					Y	Y	
Curtis Conway	C/P			Y	Y				
David Cooper	C/P				Y	Y			
Milton Cooper	Janco lead inactive	C/P							3333 New Hyd
e Park Rd, Suite 100	New Hyde Park	NY	11042	Y	Y				
Jeffrey Coopersmith	I			Y	Y				
Lou Cortese	Robertson prospect active							191 Glen Rd	Mountainside
NJ 7092									
Cox, Berry	Cox Partners	P						2100 McKinney Ave, Suite 1700	Dall
as TX 75201									
Crystal, Jonathan	Jonathan	Crystal	I						
Fianncial Sq 32	Old Slip	New York	NY	10005	Y	Y			
Danziger, Thomas	Thomas	Danziger	I						405
Park Ave	New York	NY	10022	Y	Y				
David Deutsch									
Winston Advisors	Christopher	Donabedian	P						200 Technece
nter Drive, Suite 200	Milford OH	45150							
Brooks Duncan	I			Y	Y				
Dzialga, Kirsten & Mark	Kristen	Dzialga	P						15 Meadowcro
ft Lane Greenwich	CT	6830							
Ehrenkraz, Pamela	Pamela	Ehrenkraz	I						51 W
est 52nd St	New York	NY	10019	Y	Y				
Falk, Charles	Charles	Falk	I					25 Devonshire Lane	
Mendham NJ 7945	Y	Y							
Andrew Farkas	Kimble prospect active							717 Fifth Ave, 19th	
Fl New York	NY	10022							
Fine, Lonnie	Lonnie	Fine	I						10 Fifth St
Valley Stream NY	11581	Y							
Fitzgibbons, John	John	Fitzgibbons	P						405
Lexington Ave, Fl 71	New York	NY	10174	Y	Y				
Forrestal Capital	Annette	Franqui	P						1450
Brickell Avenue	Miami	FL	33131	General n/a	sent 12/12, follow-up 1/5, 8/12 sent				
3/1 sent 2/26	Sent 9/14	Sent 9/14	Sent 9/14	Y					
Gaslow, Lawrence	Peter	Gaslow	P						105
Madison Ave, 15th Fl	New York	NY	10016	Y	Y				
Edouard Gerschel	C/P			Y	Y				
Ari Glass	C/P			Y	Y				
Glickman, Donald	Don	Glickman	P						
General Atlantic Family	Office	Rich	Gold	P					
3 Pickwick Plaza	Greenwich	CT	6830						
Christopher	Goldberg								
Dorrance Family	DFE Enterprises	Clint	Gossage	P					
Blue Mountain	Peter	Greatrex	P						
280 Park Ave, 12th Fl	New York	NY	10017						
Green, Alex	Alex	Green				911 Carriage Way		Southlake	TX
76092									
Bruce Gross	Kimble lead active	C/P							700 Northwes
t 107th Ave	Miami	FL	33172	Y					
Robert Haier	C/P				Y	Y			
David Halliwill	C/P				Y	Y			
Ira Halperin	I				Y	Y			
Cathy Handley	C/P			Y	Y				
Daniel Heflin	Sohrab prospect inactive	P						Y	Y
Holterbosch, Heidi	Heidi	Holterbosch	P						375
Park Ave	New York	NY	10152	Y	Y				
Sonen Capital	David	Hood	P			50 Osgood Place, Ste. 320			San
Francisco CA	94133								
Robert Hull	LaRoe lead active							TX	
Makan, Divesh	ICONIQ Capital LLC					394 Pacific Ave, 2nd Floor			San
Francisco CA	94111	Credit	n/a	need to focus on unique solutions				sent 12/18	
sent 2/26									
Makan, Divesh	ICONIQ Capital LLC					394 Pacific Ave, 2nd Floor			San
Francisco CA	94111	Credit	n/a	need to focus on unique solutions				sent 12/18	
sent 2/26	Sent 9/14	Sent 9/14	Sent 9/14	Y					
Makan, Divesh	ICONIQ Capital LLC					394 Pacific Ave, 2nd Floor			San
Francisco CA	94111	Credit	n/a	need to focus on unique solutions				sent 12/18	
sent 2/26									
Matt Ireland	C/P			Y	Y				
Jain, Neil	Neil	Jain	C/P						158 Third St, PO Box
583 Mineola NY	11501	Y	Y						
Sonny Jain	C/P			Y	Y				
Jesselson Capital	Michael Jesselson	Vrablic lead active	P						
.com	130 Ave of America, Suite 4101	New York	NY	10019					
Ken Jones									
Rich Joslin									
Keenan, William	Howard	William Keenan	P						410
Park Ave	New York	NY	10022	Y	Y				
Kelly, Judy	Judy	Kelly	C/P					445 Park Ave, Suite 1502	
New York	NY	10022	Y						

Avi Kestenbaum	Janco lead inactive	C/P							Y	Y
Kimmel, Adam	Adam Kimmel	C/P							Y	Y
Jeff Kirwood									Y	Y
Klein, Martin	Martin Klein	C/P							580 5th Ave, 5th Fl	
New York	NY	10036	Y	Y						
Kristoff, Mark	Mark Kristoff	C/P								825
Third Ave, 9th Fl	New York	NY	10022	Y	Y					
Charles Krusen	Jacoby lead active	C/P							Y	Y
Alan Kufeld	Robertson lead inactive	I							1350 Avenue	
of Americas	New York	NY	10019	Y	Y					
Laffont, Philippe	Philippe Laffont	P							9 West 57th	
St New York	NY	10019								
Guilford Company	James Landrigan	P								P.O.
Box 13439	Richmond VA	23225								
Larocca, Robert	Robert Larocca	I							135 Crossway	
s Park Drive	Woodbury NY	11797	Y	Y						
Yorktown Partners, LLC	Bryan H. Lawrence	P								410
Park Ave, 19th Fl	New York NY	10022								
Bryan R. Lawrence										
Cold Spring Harbor Laboratory	Richard Leeds	P								11 H
arbor Park Dr	Port Washington NY	11050	Y	Y						
Yorktown Partners, LLC	Peter Leidel	P							NY	Y
Y N										Y
Levy, Jared	Jared Levy	I							1633 Broadway	New
York NY	10019	Y	Y							
John Lummis	C/P				Y	Y				
Gene Lynch										
Mel Manion										
David Manlowe	Erskine prospect inactive									
Bryce Markus	Sohrab prospect active									
Disney, Roy	Shamrock Greg Martin	P							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										
Kelly Masuda										
William McBride					Y	Y				
Meister, Todd	Todd Meister	P							Y	Y
Richard Merage	Convey lead active									
Michael, Neal	Neal Milch	P							NY	Y
David Mitchell										Y
Erik Moody										
Catherine Moreatis	C/P	Y	Y							
Moriwaki, Gary S.	Gary Moriwaki	I								
100 Park Ave, 3rd Fl	New York NY	10017	Y	Y						
Murray, Thomas	Thomas Murray	I			Y	Y				
Murstein, Alvin	Alvin Murstein	P							New York	NY
Y Y										
Murstein, Alvin	Andrew Murstein	P							New York	NY
Y										Y
Anup Patel										
Pensler, Sandy	Sandy Pensler	P							NY	Y
Persico, Anthony	Anthony Persico	I								Y
Yorktown Partners, LLC	George Petrides	I								Y
Deepak Raj										
Lewis Ranieri	Sabbagh prospect active	C/P							Y	Y
Ben Rechler	Powers prospect inactive									
Julie Richardson	C/P								Y	Y
Colby Rollins	C/P				Y	Y				
Rose, Simon	Simon Rose	C/P							Y	Y
Kevin Ryan	C/P								Y	Y
Schaefer, Marla	Marla Schaefer	P							Y	Y
Schreiber, Karl	Karl Schreiber	P								
Seelig, Mark	Mark Seelig									
Matt Serra										
Phillip Shefter	C/P								Y	Y
Richard Simon	C/P				Y	Y				
Slome, Ian	Ian Slome	P							150 East 58th Street, 34th F	
loor New York	NY	10155								
oducts; PE and HF	n/a								RE (US, Europe, R+C) via direct investment, PE or struct. Pr	
er sent 2/5	passed 2/27								Risk averse. Already seeing HF ideas from AFS send RIN?	teas
Jamie Smith									mentioned 2/26, sent 3/16. Passed 3/30	
Inder Sodhi	Jensen prospect inactive	C/P							Y	Y
Dorrance Family	DFE Enterprises	Jason Stiles	P							
Stirtz, William P.	William Stirtz	P								835
S 8th St	St. Louis MO	63102								
John Straus										
Tharani, Haresh	Haresh Tharani	P							Y	Y
Elysium Management	Brad Wechsler	P								800 Park Ave, 12th F
l New York	NY	10021								

Weiss, George	George	Weiss	P	Hartford	CT	Y	Y	Y	N	
Cavalry Andrew	Zaro	P								
Zubillaga, Alex	Alex	Zubillaga	C/P							345
Park Ave, 12th Fl		New York	NY	10152	Y	Y				
Zuckerberg, Lloyd		Lloyd	Zuckerberg	C/P				Y	Y	
Annandale Capital		P		325 North St.	Paul Street Suite 3500	Dallas TX			75201	Gene
ral. Funds easier, but comfortable with direct PE		n/a		RIN, RESOF, Suntext, Astra follow up						
sent 3/20. May have interest in second close		sent 3/20		sent 3/1					sent 3/24	
Anschutz				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										
Arcus				060 Peachtree Rd. NW Suite 1880		Atlanta GA			30305	
Arcus				3060 Peachtree Rd. NW Suite 1880		Atlanta GA				3030
5										
BBR Partners	P					140 E. 45th Street, 26th Flo				
or	New York	NY	10017	Energy, EM, funds		on Blackrock DNC list				sent 3/16.
Passed 3/24										
Blank				3223 Howell Mill Road, Northwest		Atlanta GA			30347	
Bluestem LLC	P					212 E. Main Street, Suite 201				Charlottesvi
lle	VA	22902		General		sent 3/1. Passed 3/12				
Bright Group	P			200 Greenbrier Road		Summersville WV				2665
1										
Caruso Affiliated						101 The Grove Drive			Los Angeles	CA
90036				Real Estate, general		sent 2/26. Passed 3/20				
CFM	P			720 University Avenue, Suite 200		Los Gatos				CA
95032				sent 2/26. Passed 2/26 Convey sending?						
CFM	P			720 University Avenue, Suite 200		Los Gatos				CA
95032				sent 2/26. Passed 2/26 Convey sending?						
Dart Management	P					Windward 3, Regatta Office Park Grand Cayman				
Cayman Islands KY1-1206				General, Biotech?, Pre-IPO mezz financing, MSBs MSBs?		Deep value f				ocus, lots of cash collateral, separate real estate group
Do not send research emails						sent 12/18				teaser sent 2/5 N
Dock Street	P					510 Feheley Drive				King of Prus
sia	PA	19406		General n/a		already covered by PCS, just check in occasionally				
Duncan Investments	P			ghammer@eprod.com		1100 Louisiana Street, Suite 5200				Hous
ton	TX	77002								
Edge				1380 W. Paces Ferry Rd. Suite 1000		Atlanta GA				3032
7										
Edge				1380 W. Paces Ferry Rd. Suite 1000		Atlanta GA				3032
7										
Edge				1380 W. Paces Ferry Rd. Suite 1000		Atlanta GA				3032
7										
Essig				174 Nassau Street #320		Princeton NJ			08542	
EverWatch Financial	P					8 Sound Shore Drive, Suite 200				Gree
nwich	CT	06830		General, but like industrial/agg services, oil & gas, enviromental		Maintain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML				Send RESOF and Astra
ain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML				sent 8/12		sent 3/18. Passed 3/30				sent 3/16
EverWatch Financial	P					8 Sound Shore Drive, Suite 200				Greenwich
CT	06830			General, but like industrial/agg services, oil & gas, enviromental		Maintain lvg. against some commercial RE. Used to have large CL loan @ CS and BAML				Send RESOF and Astra
. against some commercial RE. Used to have large CL loan @ CS and BAML				sent 8/12		sent 3/18. Passed 3/30				sent 3/16
Ford				200 Crescent Court Suite 1365		Dallas TX			75021	
Forrestal Capital	P					1450 Brickell Avenue				Miami FL
33131				General n/a		sent 12/12, follow-up 1/5, 8/12				sent 3/1
Sent 9/14				Sent 9/14		Y				sent 2/26
Georgetown U	P					1000 Potomac Street Suite 301				Washington DC
20007				General n/a		Macro - send CIO materials regularly				risk factors
3/16. Passed 3/19										teaser sent 2/5 sent
Glenmede						1650 Market Street Suite 1200				Philadelphia
PA	19103									
Granite Group	P			187 Danbury Road		Wilton CT			06897	General open to funds
ing in NYC				sent 3/16						meet
Highlander Partners	P					300 Crescent Court Suite 550				Dall
as	TX	75201		General puts on public equity?		Poland, homebuilding and materials				RESO
F follow up				sent 12/12		sent 3/1. Passed 3/30				sent 3/16. Passed 3/30
Illig, Cliff	P					8900 State Line Road 5th Floor				Leawood KS
66206										
Illig, Cliff	P					8900 State Line Road 5th Floor				Leawood KS
6										6620
Infinity Q				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				
Infinity Q				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				
Ironsides AM	P			ironsides@bloomberg.net		511 Tarrytown Center				Rocky Mount NC
										2780

4	General meeting in NC	sent 8/12	sent 3/1	sent 3/24	Sent 9/14	Sent
9/14	Sent 9/14	Y				
JL Squared Group				2929 Arch Street, 13th Floor	Philadelphia	
PA	19104					
JL Squared Group				2929 Arch Street, 13th Floor	Philadelphia	
PA	19104					
Lindemann Family						
M20 Inc P			515 South Figueroa Street, Suite 1050	Los Angeles		
CA	90071	Small operating businesses	n/a	Microcap activist w/ \$1-\$5mm EBITDA target	1	
0% stakes		sent 3/1. Passed 3/2				
Makena Capital Management	P	2755 Sand Hill Rd, Suite 200	Menlo Park	CA	9402	
5	Risk factors	met 2/2 NDA and portfolio analysis				
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		
Merage		660 Newport Center Drive. Suite 1300	Newport Beach	CA	9266	
0	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		
Do not send research emails						
Nicholas		15 Enterprise, Ste. 550	Aliso Viejo	CA	9265	
6	DPM	BRCM hedge into diversified assets. Also want broad banking relationship				
Nicholas		DPM	BRCM hedge into diversified assets. Also wa			
nt broad banking relationship						
Orix P		1717 Main Street, Suite 1100	Dallas TX	75201	CLOs	
, consumer finance, esoteric have complete portal access. Primarily focused on rates 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 Folloed up 9/10 teaser sent						
and call 2/5. passed 3/27 sent 3/1 sent 3/16 sent 7/28 Sent 9/10						
Parami P		6 East 74th Street	New York	NY	10021	
Parami P		6 East 74th Street	New York	NY	10021	
Peregrine Group P		2101 Cedar Springs Rd, Suite 1800	Dallas TX	7520		
1	Energy n/a	covered by brokers already for public markets trading		mineral rights in Pe		
rmian	mentioned 12/4	mentioned 12/4	sent 3/1			
Schmidt, Eric	Hillspire LLC P		1010 El Camino Real, Suite 200	Menl		
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						
Slome, Ian	P		150 East 58th Street, 34th Floor	New		
York NY	10155	RE (US, Europe, R+C) via direct investment, PE or struct. Products; PE and H				
F	n/a	Risk averse. Already seeing HF ideas from AFS send RIN?		teaser sent 2/5 pass		
ed 2/27 mentioned 2/26, sent 3/16. Passed 3/30						
Snyder, Daniel P			11900 River Road	Potomac MD	2085	
4	Sent 9/14	Sent 9/14	Sent 9/14	Y		
Sonen Capital P			50 Osgood Place, Ste. 320	San Francisc		
o CA	94133					
Spruce Private Investors LLC	P		263 Tresser Blvd, 15th Floor			
Stamford CT	06901	Systematic gamma decay Trading with CS Introduce AFS or CB&S				
Spruce Private Investors LLC			263 Tresser Blvd, 15th Floor	Stam		
ford CT	06901	Systematic gamma decay Trading with CS Introduce AFS or CB&S				
Stiritz, William P.						
Thomson		65 Queen Street West Suite 2400	Toronto ON, Canada	M5H 2M8		
True North Advisors	P		8350 N. Central Expressway,			
Ste. 725	Dallas TX	75205				
United Company		1005 Glenway Avenue	Bristol VA	24201		
White Deer Energy	Kristin P		Y	Y		
Willett Advisors	P		New York	NY	Real Assets	
with focus on natural resources and real estate n/a commodities 20% ownership 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						
For internal use only						

Paul Contacts

First Name nt/Prospect	Last Name Intermediary	Messaging ID Client/Prospect	CIO Outlook	Tax Topics	Intermediary	Clie
Arun Alagappan	arun@at-ny.com	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	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	Y	I	0 IF (H7="I", "I", IF (I7="C/P", "C/P", "NA"))=I
Russell Artzt		Y	Y	Y	0	C/P IF (H8="I", "I", IF (I8="C/P", "C/P", "NA"))=C/P
Eric Attias		0	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		0	0			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			Y	Y	Y	0 C/P IF (H14="I", "I", IF (I14="C/P", "C/P", "NA"))=C/P
Harry Beller		Y	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	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	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	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	Y	0	C/P IF (H36="I", "I", IF (I36="C/P", "C/P", "NA"))=C/P
David Cooper			Y	Y	Y	0 C/P IF (H37="I", "I", IF (I37="C/P", "C/P", "NA"))=C/P
Milton Cooper		Y	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	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	Y	I	0	IF (H81="I", "I", IF (I81="C/P", "C/P", "NA"))=I	
Philippe Larocca		0	0	IF (H82="I", "I", IF (I82="C/P", "C/P", "NA"))=NA				
Robert Larocca		Y	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	0		IF (H90="I", "I", IF (I90="C/P", "C/P", "NA"))=NA
Mel Manion					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	0		IF (H93="I", "I", IF (I93="C/P", "C/P", "NA"))=NA
Kelly Masuda					0	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	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	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	Y	I 0 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	Y	0 C/P 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	Y	0	C/P IF (H107="I", "I", IF (I107="C/P", "C/P", "NA"))=C/P
Anthony Persico					0	0		IF (H108="I", "I", IF (I108="C/P", "C/P", "NA"))=NA
George Petrides					Y	Y	Y	I 0 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	Y	0 C/P 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	Y	0	C/P IF (H117="I", "I", IF (I117="C/P", "C/P", "NA"))=C/P
Karl Schreiber					0	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	Y	0	C/P 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	0		IF (H125="I", "I", IF (I125="C/P", "C/P", "NA"))=NA
Haresh Tharani				Y	Y	Y	0	C/P IF (H126="I", "I", IF (I126="C/P", "C/P", "NA"))=C/P
Brad Wechsler					0	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	Y	0 C/P 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
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Client/ Prospect	Email	Address1	City	State	Zip		
Alex Green		911 Carriage Way	Southlake	TX	76092		
Annandale		325 North St. Paul Street Suite	3500 Dallas	TX	75201		
Anschutz 80202		555 Seventeenth Street, Suite	2400	Denver	CO		
Arcus		50 Peachtree Rd. NW Suite	1880 Atlanta	GA	30305		
Arcus 5		3060 Peachtree Rd. NW Suite	1880 Atlanta	GA	3030		
BBR 7		140 E. 45th Street, 26th Floor	New York	NY	1001		
Blank		3223 Howell Mill Road, Northwest	Atlanta	GA	30347		
Bluestem 22902		212 E. Main Street, Suite	201 Charlottesville	VA			
Bright Group		200 Greenbrier Road	Summersville	WV	26651		
Caruso Affiliated 90036		101 The Grove Drive	Los Angeles	CA			
Caruso (Richard) PA 19085		795 E. Lancaster Avenue Suite	200 Villanova				
Caruso (Richard) anova PA 19085		795 E. Lancaster Avenue Suite	200 Vill				
CFM 2		720 University Avenue, Suite	200 Los Gatos	CA	9503		
CFM 2		720 University Avenue, Suite	200 Los Gatos	CA	9503		
Cox		2100 McKinney Ave, Suite	1700 Dallas	TX	75201		
Dock Street 19406		510 Fehelley Drive	King of Prussia	PA			
Donabedian 0		200 Technecenter Drive, Suite	200 Milford	OH	4515		
Dorrance Dorrance							
Duncan Edge 7		00 Louisiana Street, Suite	5200 Houston	TX	77002		
Edge 7		1380 W. Paces Ferry Rd. Suite	1000 Atlanta	GA	3032		
Edge 7		1380 W. Paces Ferry Rd. Suite	1000 Atlanta	GA	3032		
Edge 7		1380 W. Paces Ferry Rd. Suite	1000 Atlanta	GA	3032		
Essig		174 Nassau Street #320	Princeton	NJ	08542		
Everwatch 06830		8 Sound Shore Drive, Suite	200 Greenwich	CT			
Everwatch 06830		8 Sound Shore Drive, Suite	200 Greenwich	CT			
Everwatch 0		8 Sound Shore Drive, Suite	200 Greenwich	CT	0683		
Ford		200 Crescent Court Suite	1365 Dallas	TX	75021		
Forrestal		1450 Brickell Avenue	Miami	FL	33131		
Forrestal		1450 Brickell Avenue	Miami	FL	33131		
Georgetown 7		1000 Potomac Street Suite	301 Washington	DC	2000		
Glenmede PA 19103		1650 Market Street Suite	1200 Philadelphia				
Granite Group		187 Danbury Road	Wilton	CT	06897		
Guilford		P.O. Box 13439	Richmond	VA	23225		
Highlander 1		300 Crescent Court Suite	550 Dallas	TX	7520		
Hillspire 5		1010 El Camino Real, Suite	200 Menlo Park	CA	9402		
Hillspire 5		1010 El Camino Real, Suite	200 Menlo Park	CA	9402		
Iconiq		394 Pacific Ave, 2nd Floor	San Francisco	CA	94111		
Iconiq		394 Pacific Ave, 2nd Floor	San Francisco	CA	94111		
Iconiq		394 Pacific Ave, 2nd Floor	San Francisco	CA	94111		
Illig		8900 State Line Road 5th Floor	Leawood	KS	66206		
Infinity Q		888 7th Avenue	New York	NY	10106		
Infinity Q		888 7th Avenue	New York	NY	10106		
Ironsides		511 Tarrytown Center	Rocky Mount	NC	27804		
JL squared 19104		2929 Arch Street, 13th Floor	Philadelphia	PA			
JL squared 19104		2929 Arch Street, 13th Floor	Philadelphia	PA			
Lindemann m20 90071		515 South Figueroa Street, Suite	1050 Los Angeles	CA			
Nicholas 6		15 Enterprise, Ste. 550	Aliso Viejo	CA	9265		
Nicholas							

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]	50 Osgood Place, Ste. 320	San Francisco CA	94133
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	Dallas TX	
as TX	[REDACTED]			
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			