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**From:** Diego Galan [REDACTED]  
**Sent:** 1/24/2015 1:25:54 PM  
**To:** Chip Packard [REDACTED]; Haig Ariyan [REDACTED]  
**CC:** Caroline Kitidis [REDACTED]; Mathew Negus [REDACTED]  
**Subject:** RE: Quintessentially Platinum - coming soon. Your support required. [C]  
**Attachments:** Quint\_2015.xlsx

Classification: **Confidential**

Chip / Haig,

Based on the file, there are 61 clients and 9 prospects identified as potential participants. See below the USBP Bankers / PCS brokers covering these relationships and number of clients / prospects.

Do you want to invite all the bankers / CAs below to the call on Wednesday?

Thanks,  
Diego

1) USBP bankers and number of clients / prospects

|                        |   |
|------------------------|---|
| Sohrab/Mullin          | 7 |
| Jensen/Shaw            | 6 |
| Convey/Marson/Moore    | 6 |
| McCarthy/Rodin         | 5 |
| Mary Ann Coleman       | 5 |
| Rosemary Vrablic       | 4 |
| Paller/Gray            | 4 |
| George Zahringer       | 4 |
| Paul Morris            | 2 |
| Jacoby/Westhoff/King   | 2 |
| Susan Burnett          | 2 |
| Herlihy/Lok            | 2 |
| Daulton/Webster        | 1 |
| Terrence Tangney       | 1 |
| Russ Daulton           | 1 |
| Loudenslager/Robertson | 1 |
| Ed Finley              | 1 |
| McCarthy               | 1 |
| Ed Lok                 | 1 |

2) PCS CAs and number of clients / prospects

|                          |   |
|--------------------------|---|
| Rod Mckay                | 2 |
| John Tonzola             | 2 |
| Sanjan Dhody             | 2 |
| Brad LaConte             | 1 |
| Robert Leidy / McCluskey | 1 |
| Liz Schreiber            | 1 |
| Bill Grous               | 1 |
| Ed Maier/Jeff Neal       | 1 |
| Tony Fagella             | 1 |
| Hassan/Germann           | 1 |