

Sheet1

Paul Morris

Capital Markets

Client	Investment EQ	Mgmt FX Industry	Lending Credit	Private Rates	Markets Other & Comments	Cap Markets Tier	Level of sophistication Client Type	Comments	(Capital Mar Sour
Epstein	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Falcon Trail Capital LLC	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Tisch Family (TFMG)	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Black	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Madison Park Capital LLC	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
TOMS Capital	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Thirdlake	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Butterfly Trust	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
Mark & Kirsten Dzialga	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
General Atlantic Family Office	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
OPTIONS:	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>	<Select>
0	e.g. pure Consumer	Beta investor	(1) Low	Yes	Private account	Established wealth	(multi generation		
0.10	(2) Low - medium Education	Tier 1	No	Single Family Office	Entrepreneurial wealth	(first genera			
0.20	(3) medium	Tier 2		Multi Family Office	Inherited wealth ("Next Generation")				
0.30	(4) medium - high	Tier 3		Corporate Holding	Executive wealth	Gaming, Leisure & Lo			
0.40	e.g. Hedge Fund manager	No tier	(5) high	Other	Financial / liquid wealth	Healthcare			
0.50	N/A	Industrial							
0.60	Media & Telecom								
0.70	Natural Resources								
0.80	Real Estate								
0.90	Technology								
1	Other								

N/A

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