
From: Stewart Oldfield [REDACTED]
Sent: 2/8/2018 11:21:25 AM
To: Richard Kahn [REDACTED]
CC: Bradley Gillin [REDACTED]; Cynthia Rodriguez [REDACTED]
BCC: [REDACTED]
Subject: DB account docs
Attachments: Deposit_Acct_Opening_App.pdf; Signature_Card.pdf; W9.pdf; DIS Form.pdf

Rich,

Please see attached forms to complete. We will need the originals returned along with the following for KYC purposes. If you would like us to prefill some of the info, just email or call. Note that for the account opening, she will need a DBTCA checking account, DB AG Preferred Banking Acct and DB AG Preferred CD. We can fill in the CD rate/term info later.

- Name(s)
- Address
- Date of Birth
- Social Security Number
- Source of Wealth
- Source of where funds are coming from to fund the CD (bank statement)
- Photo ID

Thanks,

Stew



Stewart Oldfield, CFA, CAIA
[REDACTED]

Deutsche Bank Trust Company Americas
Deutsche Bank Wealth Management
345 Park Avenue, New York, NY 10154
Tel. [REDACTED]
Mobile [REDACTED]
Email [REDACTED]

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