

Head of Strategy Wealth Management Americas

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From: Paul Morris/db/dbcom  
To: Diego Galan/db/dbcom@DBAMERICAS,  
Cc: Amanda Kirby/db/dbcom@DBAMERICAS  
Date: 12/03/2013 02:53 PM  
Subject: Re: Success Story for this coming Thursday USPB MD Banker meeting [I]

Classification: For internal use only

client profile:

Billionaire entrepreneur; family office, philanthropist  
Highly sophisticated private investor and trader across asset classes and derivatives  
One of largest brokerage clients at JP Morgan; Multiple relationships across the street  
Private investor in early stage VC

Deal Description:

Prospect recently moved approximately moved \$200 million of securities and cash (equities, currencies, structures, fixed income, swaps, commodities etc)  
Very active trader; ISDAs negotiated and finalized in timely manner  
Significant growth opportunity for asset growth in 2014  
Strong existing relationship with banker, multiple meetings/call with client and team got him comfortable with global trading capabilities  
Client also liked the focus of the DB platform and KCP model  
Client will trade across all asset classes using cash, derivatives and structures

Key Success Factors:

frequent dialogue with principal and family office members  
Teamwork - KCP Caroline Kitidis, Tazia Smith, Vahe Stephanian, Amanda Kirby, Blanche Christerson, Credit Risk Management, Account Opening Group (India)

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