

Team	WM Client / Account Name	dbcarr ID	GM or Umbrella Account	Active	Retain	Good To Trade	ISDA	Live Trade	Banker	KCP Coverage	ACO	KYC Outreach	RP	RR	GM Rev
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Tab 2 – “Latam”, Tab 3 – “US”, Tab 4 – “Alex Brown” – Will show

In addition to the info in Tab 1, it will also have all the products they are active for

Tab 5 – Off-Boards – Will show

The clients that we have decided we no longer want to retain

Thanks

Kind regards,

<image002.gif>

Nina Tona

Associate
 Business Control Manager, Key Client Partners – Americas
 Deutsche Bank Wealth Management

5022 Gate Parkway
 Jacksonville, Florida 32256

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