

2018 Account Planning
Financials

Relationship Name	DEERING/CROSBY
Banker Team	Team New York12
1. CRM	Stewart Oldfield
Ref. ID Number	

dbForce Date			
Relationship Net Worth	\$100 - 500 M	Relationship Segment	0
Relationship Investable Assets	\$50 - 100 M	Relationship Segment Description	0
Relationship Classification	Tier 2	Industry Group	0
Breath of Client Needs (# products)	0	Industry	0
Revenue Potential (\$m p.a.)	\$50 - 100K		
Source of Wealth	0		
	0		
Description of Wealth/Entity Assets			

Forbes 400 Ranking (as of Nov 2017) / Public Records			
Forbes 400 Rank	0	Net Worth	0 \$bn

FINANCIAL 44 (USD)	Revenues YTD		CBV		NNA YTD		NNL YTD	
	Nov-17	Nov-16	Nov-17	Nov-16	Nov-17	Nov-16	Nov-17	Nov-16
Lending Other Structured	(13,661)	0	0	0				
Lending Mortgages	0	0	0	17,689,454				
Lending Lombard	(693)	35,289	8,271,509	0				
Lending Structured Solutions		0						
Total Lending	(14,353)	35,289	8,271,509	17,689,454				
Deposits	861	11,916	165,940	4,759,944				
L&D Central Mgt	0	0						
Total L&D	(13,493)	47,204	8,437,449	22,449,398				
Capital Markets	3,332	1,715	56,022,947	43,638,028				
DPM	0	0	0	0				
Custody only	0	4						
Wealth Planning Solutions	0	0		0				
Fund Solutions	1,597	8,730	48,987,568	42,380,459				
WAM	0	0	0	0				
Other	(6,863)	5,570	0	0				
Total GPS	(1,935)	16,020	105,019,515	86,018,486				
Partnerships	0	0						
Total	(15,427)	63,225	113,447,964	108,467,884	(6,661,369)	59,008,559	0	0

Financial Ranking (by all Relationships in GMT Americas)			
Revenue Rank	6,545	CBV Rank	79

Strictly Confidential