From: Bradley Gillin [redacted]
Sent: 8/8/2018 10:35:32 AM
To: Ashok Eastman [redacted] Stewart Oldfield [redacted]
CC: Daniel Eisenberg [redacted]
Subject: RE: Our Data Integrity---Total Wealth of our Clients [I] [C]
Attachments: Total Wealth CleanUp-MayData - Oldfield.xlsx

Classification: **Confidential**

See attached.

Regards,
Brad

Bradley Gillin
Vice President
Deutsche Bank Wealth Management
345 Park Avenue, 24th Fl
New York, NY 10154
[redacted]

From: Ashok Eastman
Sent: Friday, August 03, 2018 3:16 PM
To: Stewart Oldfield [redacted]
Cc: Bradley Gillin [redacted] Daniel Eisenberg <[redacted]
Subject: FW: Our Data Integrity---Total Wealth of our Clients [I]

Hi Stew,

I hope this finds you well. As a follow-up to our discussion and Patrick's email (below), I wanted to enlist your help with a project we are working on, to cleanup/validate some information about clients and prospects.

Please find attached a list of your clients and prospects, which we pulled from DBforce. If any client relationships are missing, please let us know. And if any prospects are missing, please add a line in the spreadsheet and enter NEW in the prospect status and we will update DBforce. Please find instructions below, and if you have any questions, please contact me or Dan (cc'd).

<u>**Instructions:**</u>

- **For client relationships**, the most important field is Total Wealth (in red). However, if you do have information on liquid net worth, segment or industry (in pink - there are dropdown categories for each) please add it to the sheet.

- **For prospects**, it's the same - the Total Wealth field (orange) is most important but it would also be helpful if you could enter a Prospect Status (there is a dropdown menu) and last contact date – you can also add comments and the type of your last contact.