

This is a great start! Reads like a CS MD application. Curious to hear what Patrick thinks, and if anything else is needed.

Thanks for sharing.

Best,  
Steve

Steven Mattus

[REDACTED]

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**From:** Stewart Oldfield <[REDACTED]>  
**Date:** Monday, Jun 25, 2018, 5:19 PM  
**To:** Steven Mattus <[REDACTED]>  
**Subject:** planning email for Patrick

As discussed. Please let me know what you think. Thanks for your help and guidance as always

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**Career overview:**

20yrs in banking overall

- 16yrs investment banking/capital markets (JPM and CS)
- 4 yrs private banking (DB)
- CFA and CAIA charterholder. Series 7,9,10,24,63 licenses

**JP Morgan Investment Bank (1998-2002)**

- Debt capital markets/structured credit

**Credit Suisse Investment Bank (2002-2014)**

- Equity derivatives, structured investments, liquid alternatives
- Covered private clients (via CS private bank) for 12yrs
- Ran single stock hedging business for 10yrs (2005-2014)
- Ran structured notes distribution to private bank (2007-2011)
- Led US sales effort of liquid alternative/quantitative strategies to family offices, insurance companies, pensions and fund-of-funds (2010-2014)

**Deutsche Bank (2014 to present)**

- Had 2 competing DB offers in 2014 – Investment Banking (derivatives) and Asset Mgmt (liquid alts). Sought advice from Chip Packard, whom I had known for 12yrs
- Chip instead recruited me to join private bank, which was trying to become more investments-focused. Joined October 2014.
- I was initially teamed up with Paul Morris, who had joined from JPM 2yrs prior and was struggling. KCP was fairly new in 2014 and ISG was not yet formed.
- Paul had limited success and was asked to leave in 2016.
- At various times here, I have been offered positions as head of ISG or member of KCP
- Have never sold a share of DB stock

**Financial progress:**