

Subject: RE: Account Planning sessions [C] [I]
From: Samantha Harmon [REDACTED]
Date: Tue, 02 Jan 2018 17:40:17 -0500
To: Stewart Oldfield <[REDACTED]>

Classification: For internal use only

Thank you!

Kind regards,
Samantha Harmon

{<https://brandportal.intranet.db.com/img/modules/logo.gif>}

Samantha Harmon
Sales Support Analyst

Deutsche Bank Trust Company Americas
WM Americas
345 Park Avenue, 24th Floor

New York, NY, 10154-0004

USA
Tel. [REDACTED]
Email [REDACTED]

From: Stewart Oldfield
Sent: Tuesday, January 02, 2018 5:37 PM
To: Samantha Harmon [REDACTED]
Subject: RE: Account Planning sessions [C]

Thanks. Will have a look tmw. Should be able to get it all done this week.

From: Samantha Harmon
Sent: Tuesday, January 02, 2018 5:31 PM
To: Stewart Oldfield <[REDACTED]>
Subject: Account Planning sessions [C]

Classification: Confidential

Hi Stew,

Below are your names for the account planning session that you had provided.

Please complete the attached template, which hopefully you will find is very much stream-lined.

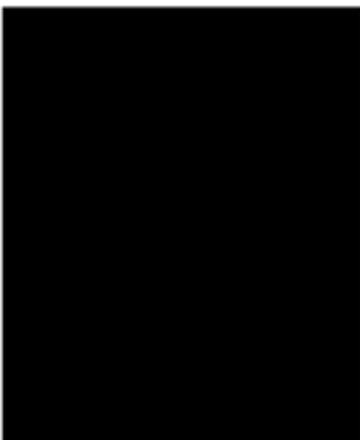
I will provide you with an additional sheet that will be pre-filled for you with financial data, but I wanted to give you as much time as possible to get these done.

Would you be able to get back to me by Friday? If this isn't possible, let me know and let's see what we can figure out.

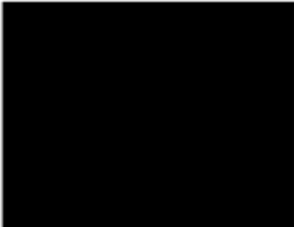
We will also need to schedule the 90 minute session which we are trying to complete in January.

I'm here all week if you have any questions or need any help.

Name



Southern Financial/Epstein



Kind regards,
Samantha Harmon

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