Wealth Management
NextGen
Summer Seminar-New Vo

Deutsche Bank



Wednesday, June 18

Deutsche Bank Center One Columbus Circle, New York, NY

Arrivals and breakfast
Welcome and introductions Management team
Session: Economic outlook Matt Luzzetti A presentation on the current economic landscape.
Session: Investment overview for families JP Egui and Sean Magee An introduction to the investment process for Wealth Management clients, The next few session on the agenda will take deep dives into these topics.
Break
Session: Discretionary Portfolio Management "DPM" Neal Elkin and Sam Matthews An introduction to our DPM organization and the ways we invest on our clients' behalf. We will also
review fixed income investing including bond types, interest rates, credit ratings and portfolio allocations.
allocations. Session: Capital Markets Ed Sibilia Discussion will include equity and fixed income strategies, hedging and diversification solutions,
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allocations. Session: Capital Markets Ed Sibilia Discussion will include equity and fixed income strategies, hedging and diversification solutions, foreign exchange and structured products. Lunch meetings with management Session: Alternatives and One Bank Solutions Shelly Wong and Carina Bartozzi A look at our unique investment opportunities available to our clients. Session: Al Adrian Cox Deutsche Bank's AI guru will join us for a discussion on artificial intelligence. Is AI all hype? Four

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Thursday, June 19

NYC Culture Club 3 World Trade Center New York, NY

10:00 am	Event: Meet at 3 World Trade Center Exhibition and studio tour at 3 World Trade Center Join us for a tour hosted by NYC Culture Club. Co-founders Clayton and Parker Calvert will take the group on a tour of the top floor to view an exhibition rich in history and full of material telling the story of the redevelopment of the WTC. It will include a chance to see part of the set of the hit tv show <i>Succession</i> as well as, visits to the artists' studios located in the building.
12:30 pm	Lunch onsite – Kaviari caviar and Billecart-Salmon champagne tasting along with classic New York style pizza from the Greenwich Village institution - Joe's Pizza.
1:30 pm	Depart WTC – transportation provided to Era, 30 East 23 at Madison
2:00 pm	Session: Al factories and startups leading the Al industrial revolution Jasper Lau, CEO/Founder of Era Era, a technology-focused investment firm, will host a panel of cutting-edge founders in Al to share their respective journeys and speak on the future of Al.
4:00 pm	Day concludes

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Friday, June 20

Deutsche Bank Center One Columbus Circle, New York, NY

10:00 am Session: A Geo-political view

Erik Soderberg

Hear from Deutsche Bank's Washington DC "insider" about global politics and the potential impact on our personal and professional lives.

11:00 amSession: The \$100 Trillion New Industrial Era
Sarah Sclarsic
Discussion with venture capital firm with a focus in carbon and clean energy.

12:00 pm Session: Insights into the Corporate Bank Paul Maley The Head of Deutsche Bank in the Americas will provide an introduction to our Corporate Bank and to hear about future opportunities for the bank as well as the importance of culture.

1:00 pm Break for lunch

3:00 pm Session: Impact

Emy Kane

In this session, hear about Lonely Whale's efforts in plastic waste reduction and their forthcoming program focused on advancing alternatives to synthetic textiles which is the largest primary source of microplastic in the ocean.

4:30 pm Event: NY Yankees baseball game

Transportation provided to the Bronx for an evening of American baseball. Watch the New York Yankees take on the Atlanta Braves from the Delta Suite at Yankee Stadium. Game begins at 7:05 pm. Refreshments will be provided.

10:00 pm Transportation available to return to Deutsche Bank Center

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Monday, June 23

Deutsche Bank Center One Columbus Circle, New York, NY

- 10:00 am Session: Wealth and succession planning
 Francesca Boschini , Gary Marzolla and Susan Rounds
 Jacqui Valouch Moderator
 This session covers the essentials of estate planning and intergenerational wealth transfer with a focus on cross-boarder and international planning.
- 11:30 am Session: Preparing for your family's wealth conversation Max Disney, Trustee, Roy & Patricia Disney Family Foundation During this 90 minutes session, you will hear from a next generation perspective, how to understand your unique position and ways you can contribute in a meaningful way.
- 1:00 pm Lunch break
- 2:15 pm Session: Navigating the family office Michael Zeuner, WE Family Office What is a family office and who needs the help of a family office. An examination of the complexities of choosing the right family office. What does it mean to manage a family office, what family offices should consider when evaluating wealth management partners, plus the role of impact investing.
- 3:30 pm Session: Simplifying family dynamics: How to earn trust and own your story?" Wendy Wecksell and Whitney Call This will be an interactive discussion to engage in activities centered on "telling our stories," which builds bonds and is incredibly powerful.
- 5:00 pm Day conclude

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Tuesday, June 24

NYSE and Deutsche Bank Center

- 10:00 am Event: Meet at NYSE, 11 Wall Street Plan to meet at white tent at the corner of Wall and Broad Streets.
 10:15 am NYSE presentation, followed by tour An exclusive opportunity to access the floor of the world's largest stock exchange.
- 11:45 am Transportation provided to Deutsche Bank Center
- 1:00 pm Session: Lunch with Sam Teicher, Co-Founder, Coral Vita

Hear from Sam Teicher on how he and Co-Founder Gator Halpern were grad students at the Yale School of the Environment when they met and forged a friendship over a shared passion for the ocean and the belief that there's a better, faster, and bigger way to combat global coral reef degradation.

2:00 pm Session: Lending

David Addison

During this session, we will review typical client scenarios associated with Wealth Management's loan product offerings, including structured, commercial and residential. We will also cover the lending process and the questions every lender—and borrower—should be asking.

3:00 pm Session: Corporate social responsibility Alessandra DiGiusto Interactive conversation about Deutsche Bank's philanthropic activities in community development, education and the arts, plus the research/selection process for philanthropy, applicable in the

education and the arts, plus the research/selection process for philanthropy, applicable in the corporate world, as well as in your personal lives.

5:00 pm Day concludes

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Wednesday, June 25

Deutsche Bank Center One Columbus Circle, New York, NY

10:00 am	Session: Tour of our art collection at Deutsche Bank Center Blaire Sacks Deutsche Bank has a world-renowned contemporary art collection, with works being acquired since the late 1970s. We will tour highlights of the collection at our U.S. headquarters.
11:00 am	Session: The 10% Entrepreneur Patrick McGinnis A revealing discussion of the realities of full-time entrepreneurship, plus a look at the benefits of traditional careers versus non-traditional ones and the available opportunities for each.
1:00 pm	Lunch break
2:00 pm	Session: Space John Lin During this session, hear about the developments and opportunities in the Space sector why is it important for humanity and what should we expect to see as important events for the sector in the coming years.
2:45 pm	Session: Markets outlook Deepak Puri Our CIO for the Americas will present our current economic and asset class forecasts, likely key issues in the coming months and our long-term investment themes.
4:00 pm	Break
5:00 pm	Event: Farewell reception Meduza, 657 Hudson Street
9:00 pm	Event concludes

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