

Moderate Risk	4		1	2	7
IA	3				3
Low Risk	2				2
Moderate Risk	1				1
LENDING	7	1		34	42
Low Risk	4	1		5	10
Moderate Risk	2			1	3
High Risk	1			28	29
TRUST	7	2	3	4	16
Low Risk	6	2	3	2	13
Moderate Risk	1			1	2
High Risk				1	1
Grand Total	166	53	22	109	350

Please note there are certain customers that *appear* to have outstanding ACUs for several months and even years. This may be due to either a system glitch or some other circumstance out of the CFP's control. I am working on these cases with the CFPs on a one to one basis. Please also note that the below reports are created as of the first of the month- clients may appear below even though the ACUs have been completed by the time all notifications are sent out.

Kind regards,
Rich Iarossi



Rich Iarossi

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Passion to Perform