

Type **New Product - Existing Client**
 Last Modified Date **5/27/2015**
 Description

Additional Brokerage

Product Family **Brokerage**
 Stage **Business Committed-Not Funded**
 Close Date **3/31/2015**
 Total Assets **\$75,000,000.00**
 Total Estimated Revenue **\$2,000,000.00**
 Probability (%) **75**
 Expected Revenue
 Lead Source
 Owner Full Name [REDACTED]
 Won
 Fiscal Period **Q2-2014**
 Next Step
 Type **Additional Assets - Existing Product**
 Last Modified Date **1/7/2015**
 Description

More Brokerage

Product Family **Brokerage**
 Stage **Business Awarded**
 Close Date **12/13/2013**
 Total Assets **\$15,000,000.00**
 Total Estimated Revenue **\$0.00**
 Probability (%) **100**
 Expected Revenue
 Lead Source
 Owner Full Name [REDACTED]
 Won
 Fiscal Period **Q1-2013**
 Next Step
 Type **Additional Assets - Existing Product**
 Last Modified Date **12/13/2013**
 Description

Additional Funds

Product Family **Brokerage**
 Stage **Business Awarded**
 Close Date **12/12/2013**
 Total Assets **\$11,000,000.00**
 Total Estimated Revenue **\$0.00**
 Probability (%) **100**
 Expected Revenue
 Lead Source
 Owner Full Name [REDACTED]
 Won
 Fiscal Period **Q1-2013**
 Next Step
 Type **Additional Assets - Existing Product**
 Last Modified Date **12/12/2013**