

Description

Additional Brokerage

Product Family **Brokerage**
 Stage **Business Awarded**
 Close Date **12/5/2013**
 Total Assets **\$10,000,000.00**
 Total Estimated Revenue **\$0.00**
 Probability (%) **100**
 Expected Revenue
 Lead Source
 Owner Full Name **Paul Morris**
 Won
 Fiscal Period **Q1-2013**
 Next Step
 Type **Additional Assets - Existing Product**
 Last Modified Date **12/9/2013**
 Description

Brokerage Funds

Product Family **Brokerage**
 Stage **Business Awarded**
 Close Date **11/26/2013**
 Total Assets **\$5,992,414.75**
 Total Estimated Revenue **\$0.00**
 Probability (%) **100**
 Expected Revenue
 Lead Source
 Owner Full Name **Paul Morris**
 Won
 Fiscal Period **Q4-2012**
 Next Step
 Type **Additional Assets - Existing Product**
 Last Modified Date **11/26/2013**
 Description

Brokerage #2

Product Family **Brokerage**
 Stage **Business Awarded**
 Close Date **10/18/2013**
 Total Assets **\$14,500,000.00**
 Total Estimated Revenue **\$0.00**
 Probability (%) **100**
 Expected Revenue
 Lead Source
 Owner Full Name **Paul Morris**
 Won
 Fiscal Period **Q4-2012**
 Next Step
 Type **New Product - Existing Client**
 Last Modified Date **10/18/2013**
 Description