

Tab 1 – Main file “WM KCP GM Clients” – Will show

To add:

1. Good to Trade – Davide
2. ISDA – Nina and Davide
3. Revenues – Nina and Ali
4. Live Trade – Davide first shot, then Nina will help
5. GM or Umbrella Account – Davide and Nina

Team	WM Client / Account Name	dbcar ID	GM or Umbrella Account	Active	Retain	Good To Trade	ISDA	Live Trade	Banker	KCP Coverage	ACO	KYC Outreach	RP	RR	GM 2017 Revenues
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Tab 2 – “Latam”, Tab 3 – “US”, Tab 4 – “Alex Brown” – Will show

In addition to the info in Tab 1, it will also have all the products they are active for

Tab 5 – Off-Boards – Will show

The clients that we have decided we no longer want to retain

Thanks

Kind regards,



Nina Tona

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