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From: Rob Wang
Sent: Wednesday, October 17, 2018 9:23 AM
To: Trey Jackson <[REDACTED]>
Cc: Ashvinkumar Chougule <[REDACTED]>; Ronny Fung <[REDACTED]>
Subject: RE: New Client Risk rating for WM clients [I]

Classification: **For internal use only**

Trey,

Yes, it would also be good to know the clients current client risk (High, Medium or Low).
In addition, what data is currently available in CRRE? Does it only contain the risk scores for clients rated using the new methodology?

Thanks
Rob

From: Trey Jackson
Sent: Wednesday, October 17, 2018 9:12 AM
To: Rob Wang <[REDACTED]>
Cc: Ashvinkumar Chougule <[REDACTED]>; Ronny Fung <[REDACTED]>
Subject: RE: New Client Risk rating for WM clients [I]

Hi Rob-

Just to follow up on the below I want to confirm that your ask is for any clients that were rated using the old methodology prior to the Oct. 1 roll out of the new CRRM:

1. How many clients are there that fall into this bucket?
2. How long each has until their next scheduled review utilizing the new methodology.

Thanks,

Trey



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