
From: Trey Jackson
Sent: Tuesday, October 16, 2018 11:05 AM
To: Rob Wang <[REDACTED]>
Cc: Ashvinkumar Chougule <[REDACTED]>; Ronny Fung <[REDACTED]>
Subject: RE: New Client Risk rating for WM clients [I]

Hi Rob-

Let me check and get back to you shortly.

Thanks,

Trey



Treyvon Jackson
Assistant Vice President
Deutsche Bank Wealth Management
Deutsche Bank Securities, Inc
5022 Gate Parkway Jacksonville, FL, 32256
Tel: +1 (904) 645-4481
[WM Mercury on myDB](#)

From: Rob Wang
Sent: Tuesday, October 16, 2018 11:01 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**

Hi Trey,

Do you have timeframes or estimates in terms of adoption for all clients where their client risk was last rated using the old methodology (prior to October 1st)? It would be helpful to have stats on # of clients with their next regular review schedule.

Thanks
Rob

From: Trey Jackson
Sent: Tuesday, October 16, 2018 9:53 AM
To: Rob Wang <[REDACTED]>
Cc: Ashvinkumar Chougule <[REDACTED]>; Ronny Fung <[REDACTED]>
Subject: RE: New Client Risk rating for WM clients [I]

Hi Rob-

Please see training material attached.