2. Client facts and circumstances – This section is meant to provide information regarding source of wealth, financial position, current and future liquidity events and investment objectives. Given the nature of this information, it will need to be entered manually for each respective relationship

3. FY2016 financials – This section is intended to provide transparency on existing product relationships for each client. To complete this section each RM team will be provided with a pre-populated Excel file with revenue and asset data from GMIS for all their respective relationships. This same data can be easily transposed into the template

4. 2017 Current Pipeline – This section seeks to identify current business opportunities being discussed with clients. Similar to the prior section, an Excel file with relevant pipeline details across all relationships will be provided to RMs

5. Account Planning Outcomes – This section is to be utilized to minute key takeaways from the account planning session and will need to be completed by a member of the team present at the meeting. In addition to the minutes all opportunities / follow up actions identified should be separately logged in dbForce for purpose of future tracking

All RM teams will receive a separate email within the next 24 hours with the financial and pipeline information referenced in sections 3 and 4.

In addition, we will be setting up two open sessions on Wednesday (3:30PM EST) and Thursday (2PM EST) to clarify any questions you may have on how to fill out the template. Details to follow.

Thanks,

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