As I mentioned on the Monday sales call, The Wealth Management ExCo, with sponsorship from Fabrizio, is initiating a global account planning exercise aimed at identifying revenue enhancement opportunities across our client base. In the Americas, this exercise will initially focus on our largest clients (~top 100) plus any near-term opportunities identified by you and then eventually expanded over the course of the year. A half day workshop with senior leadership, product heads and relationship managers will be organized during the week of July 25 (specific date to be confirmed) to conduct a detailed review of identified opportunities and agree action plans.

In preparation for the workshop, we request support from each banker team in identifying potential opportunities and prospects:
A. At a minimum, identify at least 3 relationships with potential for revenue enhancement across your client base
B. Separately, evaluate whether there are any revenue enhancement opportunities for clients you cover that are in the attached list

For all clients identified in A and all clients in list B, please complete the attached account planning template. The responses will be aggregated in to a single database for discussion at the workshop. An illustrative example of a completed account planning template and system generated financials for clients in list B have been included for reference.

Please provide your responses / completed templates to Manish Pahlajani by close of business on Wednesday, July 20.

Thank you for your focus on this and apologize for the short time frame

Andrew

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