Subject: RE: MRM questions [I]
From: Nina Tona <[redacted]>
Date: Thu, 16 May 2019 11:02:56 -0400
To: Alastair Mackinlay <[redacted]>,
Ian Salters <[redacted]>,
Davide-A Sferrazza <[redacted]>

Classification: For internal use only

Hi Davide – this file should help as it identifies clients with IWP package.

Thank you

{https://brandportal.intranet.db.com/img/modules/-DAWM_logo_metallic_46x46.gif}

Nina Tona

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#Positive Impact

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From: Alastair Mackinlay
Sent: Thursday, May 16, 2019 10:59 AM
To: Nina Tona <[redacted]>; Ian Salters <[redacted]>; Davide-A Sferrazza <[redacted]>
Subject: FW: MRM questions [I]
Importance: High

Classification: For internal use only

Hi Nina / Davide - A couple of things…

· The onboarded client and entity count should only be those who have signed the IWP package (don't include GM or WM accounts that have not)

· When you have completed the template can you try and get the date of onboarding for those proposed to offboard, see below in yellow

Thanks

Alastair Mackinlay

Institutional Wealth Partners (IWP)

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New York, NY 10154

[redacted]

From: Victoria Bruce
Sent: Thursday, May 16, 2019 10:45 AM
To: Nicholas Allen <[redacted]>; Alastair Mackinlay <[redacted]>; Max Kleinert <[redacted]>
Subject: MRM questions [I]
Importance: High

Classification: For internal use only

All

A couple of points came up in my meeting with Sandra, please can you align and update the table, adding commentary if needed:

· We show 91 IWP clients generating revenues in 2019 but 60 actively trading (definition of which is 'generating revenues')

· What is the simplest way to explain the differences between 3 exit relationships in first table and 7 in second table. Also, 8 no contact in first table vs 19+8 in second table?

· For the 7 clients we are offboarding, are you able to provide date of onboarding? It would be good to understand how long they have been with us.

These comments are also relevant for Americas and MEA.

Vicky

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Vicky Bruce
Global COO | Institutional Wealth Partners

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