From: Paul Morris [redacted]
Sent: 1/28/2015 12:26:11 PM
To: Paul Morris [redacted]
Subject: FW: Client Tiering 2015 [I]
Attachments: Tiering Worksheet - Morris.xlsx; Tiering Worksheet - Oldfield.xlsx

Classification: **For internal use only**

Paul Morris
Managing Director
Deutsche Bank Private Bank
[redacted]

From: Andrea Tapia
Sent: Friday, January 16, 2015 2:26 PM
To: Paul Morris; Stewart Oldfield
Cc: Amanda Kirby
Subject: FW: Client Tiering 2015 [I]

Classification: **For internal use only**

Following Chip's email, kindly update and complete the attached list of your clients and prospects for 2015. For your reference, detailed guidance can be found in the included "Worksheet Guide".

While all data should be reviewed for accuracy, please ensure the following:

- Fill in ALL highlighted cells:
  - Yellow blanks (key data points)
  - Green blanks (if customer is Tier 1 or 2 without identified industry group)
- It is advised to make a relationship "Inactive" (column Q) if you are no longer pursuing a prospect or consider a relationship to have no revenue potential

Please complete your respective worksheet and send it back to me by **Friday, January 30**. Let me know if you have any questions.

Kind regards,
Andrea Tapia

Andrea Tapia
Assistant Vice President

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