

*Passion to Perform*

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**From:** Samantha Harmon **On Behalf Of** Chip Packard

**Sent:** Monday, January 12, 2015 3:27 PM

**To:** USPWM Private Bankers

**Cc:** Andrea Tapia; Kimberly Hart; Lee Hutter; Michael S Jacoby; Andrew Gallivan; Michael-J Davis; Mark LaRoe

**Subject:** Client Tiering 2015 [I]

Classification: **For internal use only**

As in years past, we will shortly begin the client tiering exercise to continue our effort to promote new client acquisition and wallet share expansion. Since beginning this exercise in 2010, we have delivered consistently strong performance by strengthening existing relationships and improving prospect conversion. This past year, revenue and asset growth was again driven by Tier 1 and Tier 2 clients, with revenue contribution for each increasing by 12% and 7%, respectively. In order to maintain and leverage this traction, I would like you to update your tiering worksheets.

Please review the tiering data for your client and prospect relationships provided by Andrea Tapia for accuracy, and update fields that contain incomplete information. I believe this exercise enhances our coverage efforts and helps us deliver the bank more effectively. Thank you in advance for supporting this important initiative.



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