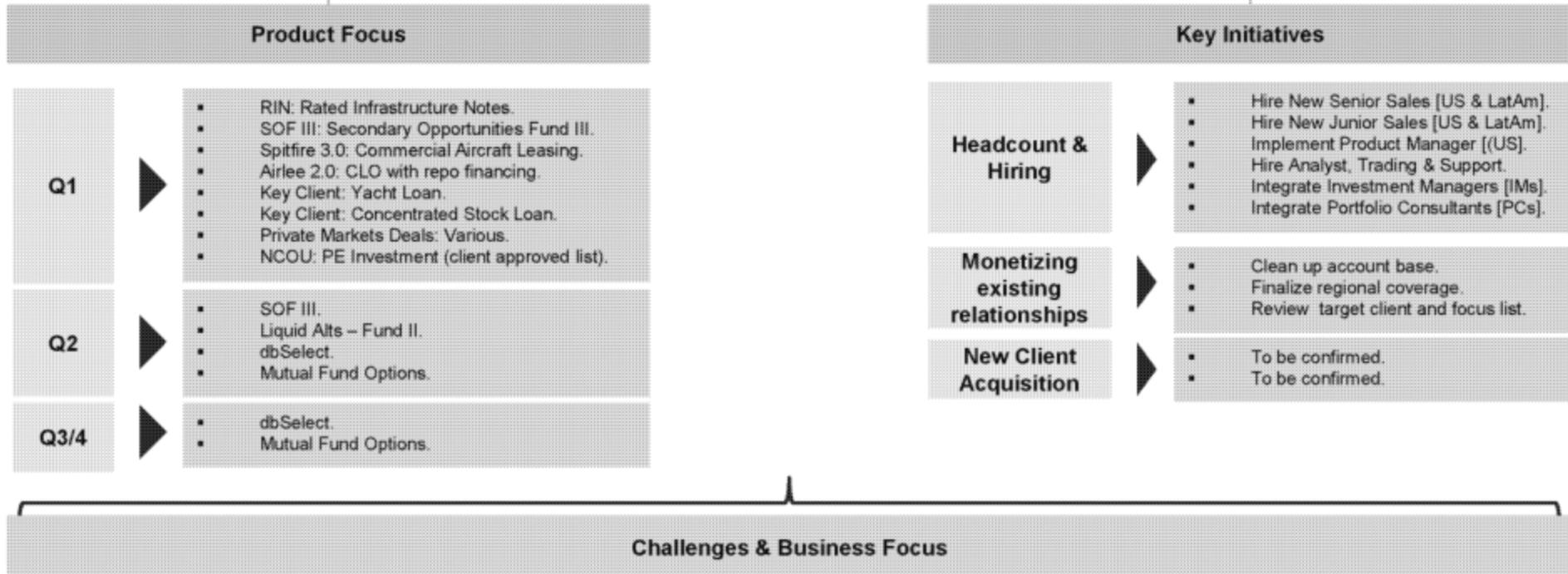




# Key Client Partners (KCP) – Americas

## 2014 Key Product Focuses & Initiatives

### Key Client Partner (KCP) Product Focus / Initiatives



### Challenges & Business Focus

- Managing inquiry: 250+ sales v 5 KCP coverage.
- Hiring and retention of talent.
- Establish quality revenue reporting system.
- Investment in operational infrastructure and tech.
- Determine broader compensation and revenue attribution for delivery of WM product through KCP.
- Drive diversified revenues: client to client transactions.
- Continue implementation and buy-in with CB&S.
- KI10 Fusion Steering Committee.
- KCP Regional Road Show.
- Standardized Investment process.
- Cohesive WM product delivery to KCP.
- Coordination & leverage Global KCP Team.
- Formalize Private Markets mandate.
- Define Capital Markets.
- Produce 'real' institutional product in WM to fit the Key client profile and investor appetite.