

To: [REDACTED]
Date: 06/06/2014 09:14 AM
Subject: Client Tiering [I]

Classification: For internal use only

Hi Chip,

RV spoke to me about the client tiering exercise that needs to be completed for the Client Advisory Board. To my understanding, the Platinum Client list has been suggested but several more clients need to be identified since Roelfien and Jerry are looking for 50 clients from WM.

If you haven't already done so, do you want to leverage the top 10 relationships for the 4 teams I sent you yesterday? Let me know if you want to discuss.

Andrea

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