

43 [REDACTED] - BUPPERT H VREELAND - CROZIER
44 [REDACTED] - PIETRUSKO C.STAFFORD/C.SCHAUER
45 [REDACTED] - MARKET MO FAHIMI/HADI FAHIM
46 [REDACTED] - WINSTON BRIAN C KAPLAN
47 [REDACTED] - GREWAL C.STAFFORD/C.SCHAUER
48 [REDACTED] - WISDOMTREE JASON WOLTER
49 [REDACTED] - BOLLING BRAD LACONTE
50 [REDACTED] - ORCHARD BN CHRIS W MCDONAGH

Regards,



Russ Johnson
Director

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Passion to Perform

▼ Chip Packard---06/18/2014 08:00:29 AM---Classification: Confidential I have run through the attached, but we need to combine with PCS (Russ,

From: Chip [REDACTED]
To: Andrea [REDACTED]
Cc: Kimberly [REDACTED] Haig [REDACTED] Russell-W [REDACTED]
Date: 06/18/2014 08:00 AM
Subject: RE: Client Tiering [C]

Classification: Confidential

I have run through the attached, but we need to combine with PCS (Russ, please take a look for Haig). I would suggest we start with a revenue based view of Top 50. I went through that column and deleted 6 names in a comment field that I added, and then went to CBV ranking and added 6 names. Let's try to turn this around today if we can, subject to Haig's input.

[attachment "Top 50 WM Relationships - 2014 May.xlsx" deleted by Russell-W [REDACTED]]