
From: Andrea Tapia [REDACTED]
Sent: 7/30/2014 3:20:55 PM
To: Chip Packard [REDACTED]
CC: Samantha Harmon [REDACTED]
Subject: RE: Q2 2013 Banker Performance Metrics [I]
Attachments: Morris Pipeline & Top 10.pdf; Finley Pipeline & Top 10.pdf; Jensen Pipeline & Top 10.pdf; Convey Pipeline & Top 10.pdf; USPB Banker Est. FY 2014.pdf

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Chip,

Attached are the one-pagers for the four requested Bankers: Morris, Finley, Jensen and Convey.

To supplement your meetings, I have also included a summary that includes YTD revenues, annualized run-rates, pipeline, and gap to plan for each team. Please let me know if you have any questions or need anything else.

Kind regards,
Andrea Tapia



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Passion to Perform

From: Chip Packard
Sent: Wednesday, July 30, 2014 12:33 PM
To: Andrea Tapia
Subject: Re: Q2 2013 Banker Performance Metrics [I]

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Very helpful. Can I please have the Top 10 clients by revenue for Morris, Finley, Jensen and Convey? Thanks.



Chip Packard