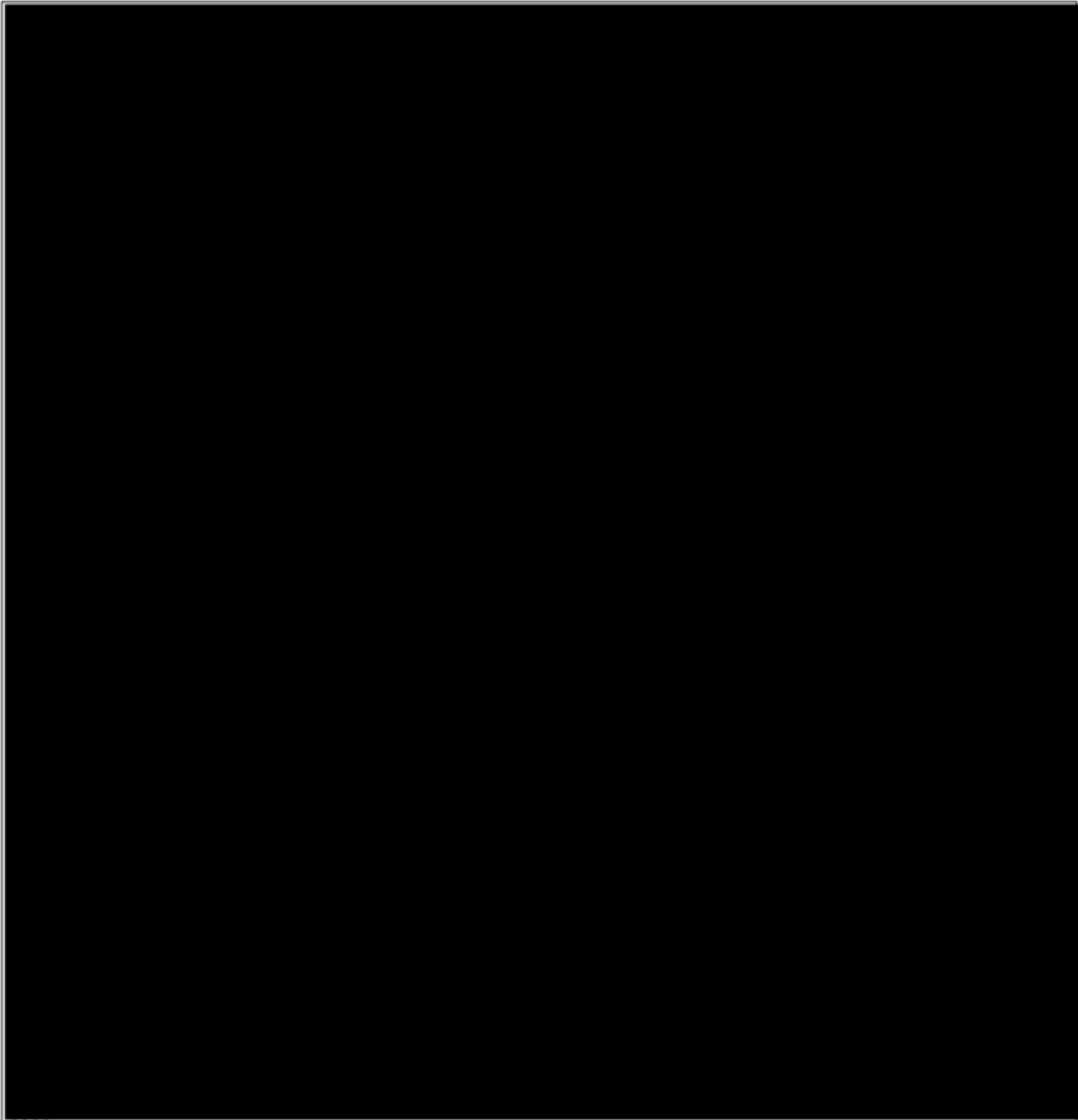


Pipeline Summary

Opportunity Name	Customer Name	%	Close Date	Product Name	Actual Assets	Stru
cture BPS/Flat Fee	Actual Revenue	Sales Team Member				
JTWROS Brokerage	[REDACTED]					
Additional Brokerage	Southern Financial LLC	75	12/31/2015	Brokerage (Commissions)	7500	
0000 Flat Fee	2000000 2000000	Paul Morris				

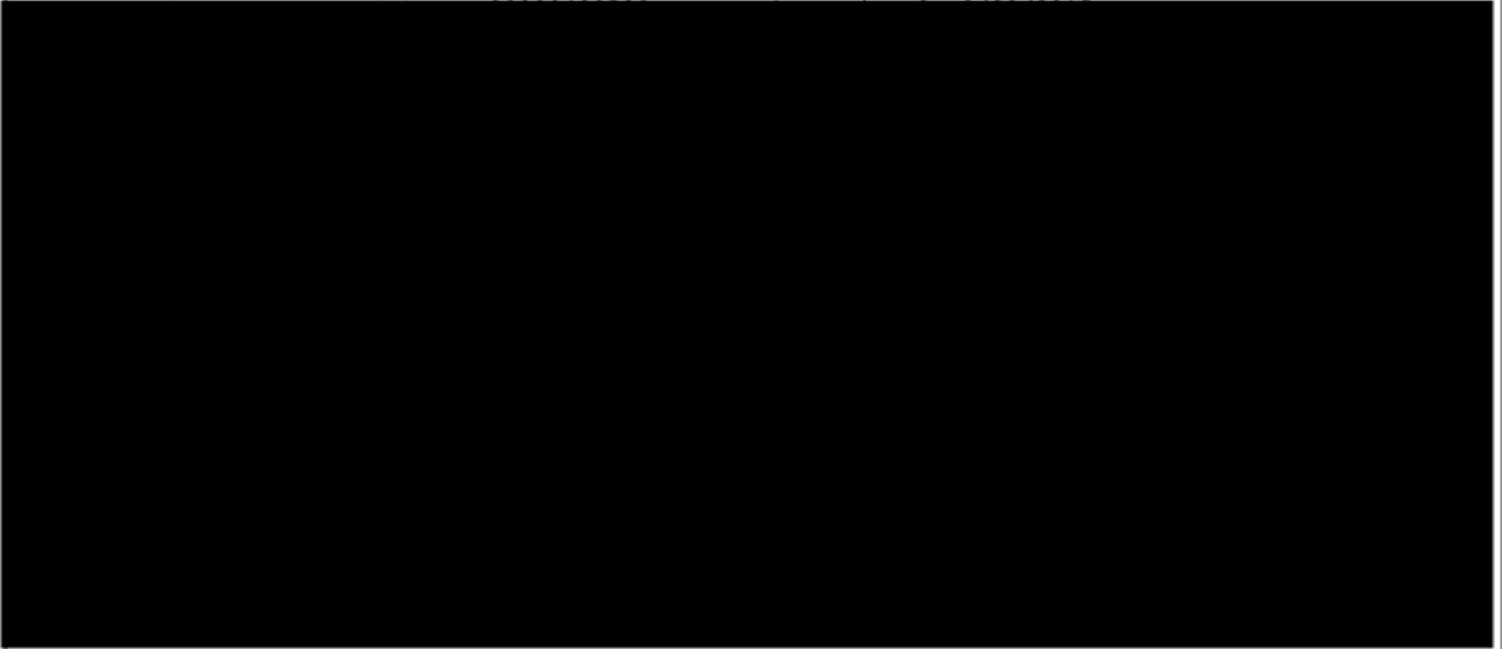
Paul 25

Customer Name	Customer Number	Status	Relationship	Classification	Rel. Net Worth	Relationship		
Investable Assets (Est.)	Revenue Potential (\$M per annum)	Last Modified Date	Last	Activity Date	Date Contacted	Forbes Ranking	Category	Notes
3 G CAPITAL RELATIONSHIP	00000492967	Active	Tier 2	#####				H



Stew 25

Customer Name	Customer Number	Status	Relationship Classification	Rel. Net Worth	Relationship
Investable Assets (Est.)		Revenue	Potential (\$M per annum)	Last Modified Date	Last
Activity Date	Date Contacted	Category	Notes		



Clients

Customer Name Customer Number Status Relationship Classification

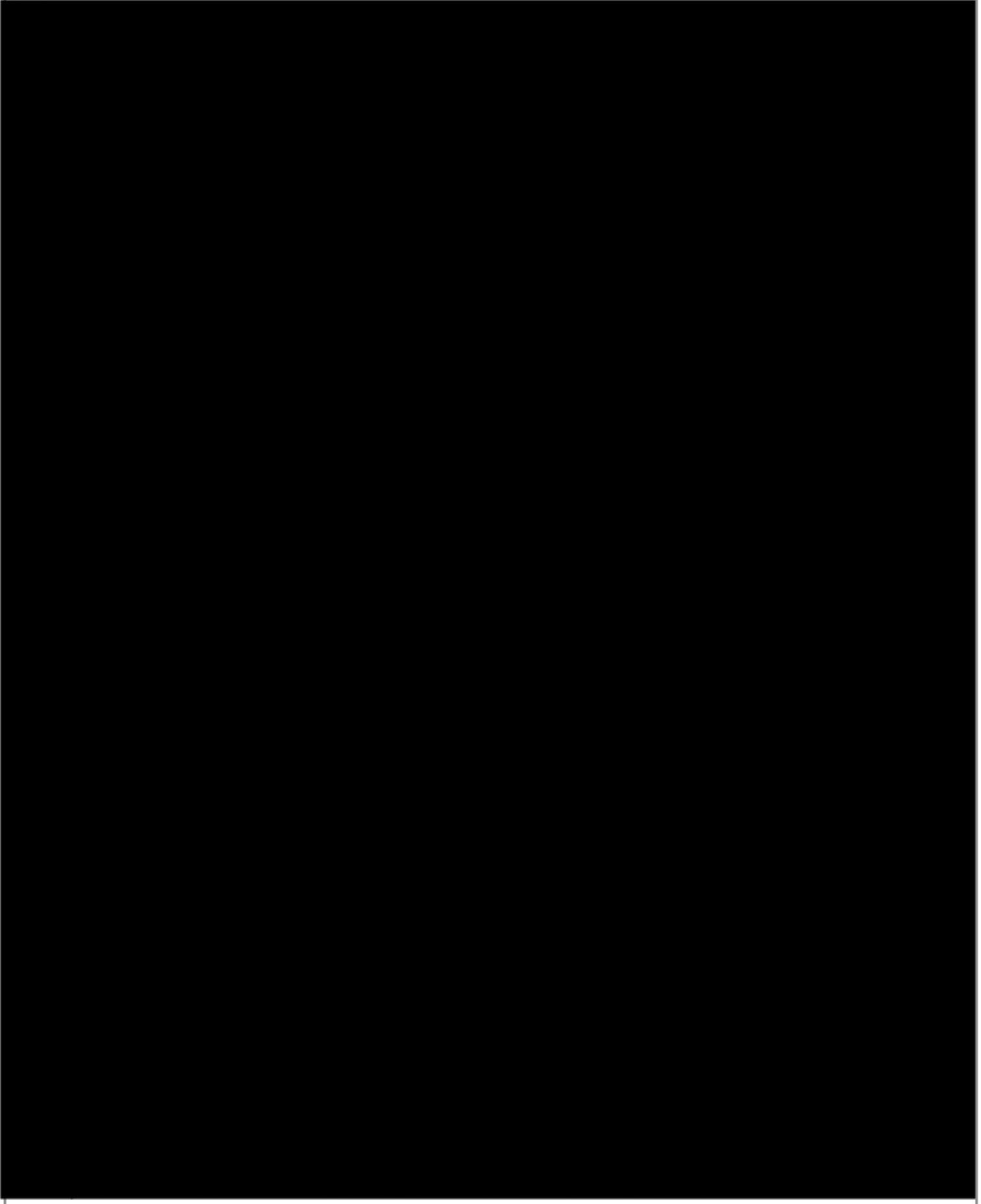


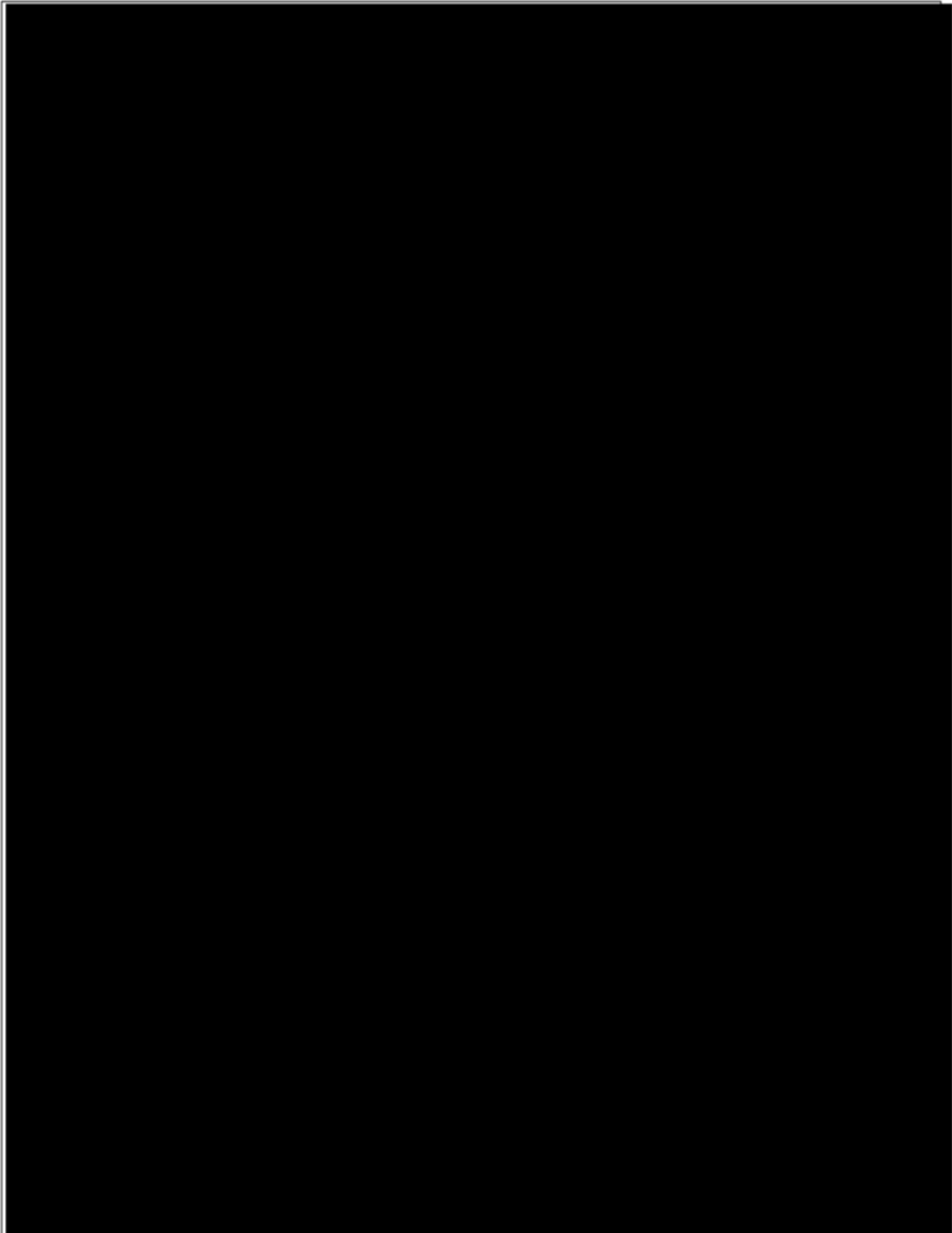
SOUTHERN FINANCIAL RELATIONSHIP 00000483290 Active Tier 1

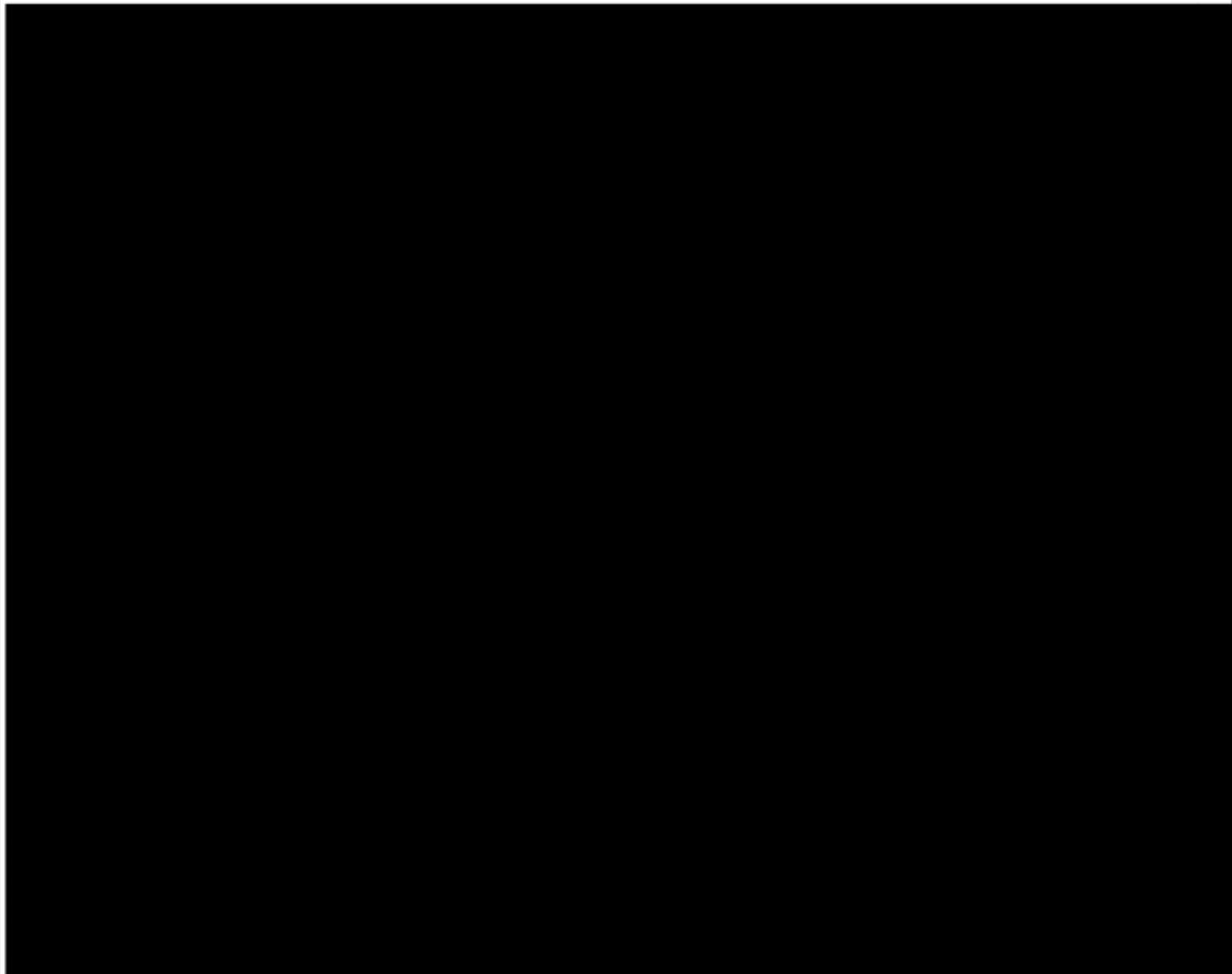


Prospects

Customer Name	Customer Number	Status	Relationship	Classification	Rel. Net Worth	Relationship
Investable Assets (Est.)		Revenue	Potential	(\$M per annum)	Last Modified Date	Cate gory







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Deutsche Bank Private Bank

Pipeline- Full

Opportunity Name	Customer Name	Close Date	Probability (%)	Product Name	Actual Asset
s	Fee Structure	BPS/Flat Fee	Revenue	Sales Team Member	

Additional Brokerage	Southern Financial LLC	3/31/2015	75	Brokerage (Commissions)	7500
0000	Flat Fee	2000000 2000000	Paul Morris		

