

Subject: RE: Client Tiering [I]  
From: Andrea Tapia [REDACTED]  
Date: Fri, 06 Jun 2014 11:55:05 -0400  
To: Chip Packard [REDACTED]  
Cc: Kimberly Hart [REDACTED]

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Chip,

Please see CBV and revenue rankings as of April YTD attached. Existing platinum relationships are highlighted in blue.

I believe the next Client Advisory meeting is this coming Monday, June 9, so please let me know if there is anything else I can do.

Kind regards,

Andrea Tapia

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From: Chip Packard  
Sent: Friday, June 06, 2014 9:51 AM  
To: Andrea Tapia  
Subject: Re: Client Tiering [I]

Classification: For internal use only

Let's look at our top 50 across US0 by CBV and Revenue and make a decision based on that. Pls send over to me, thanks.

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Chip Packard  
Co-Head, Wealth Management Americas

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Andrea Tapia/db/dbcom@DBC0EX

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To:

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Chip Packard/db/dbcom@DBAmericas,

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Subject:

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Client Tiering [I]

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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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