

Executive Summary



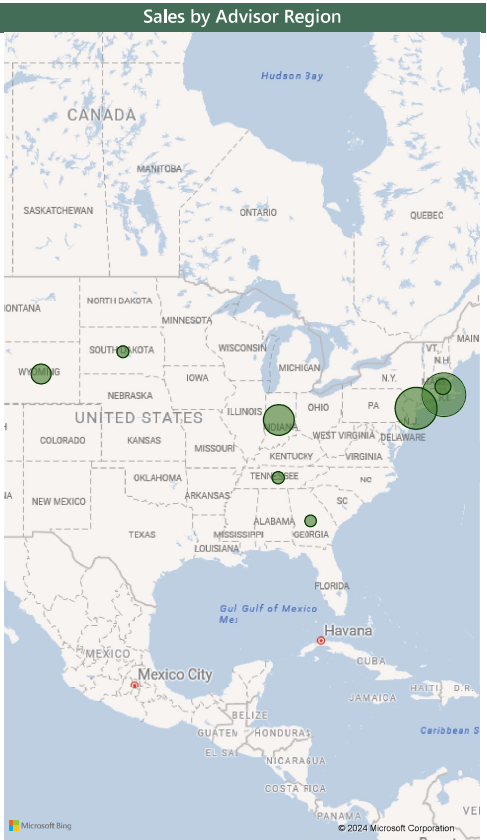
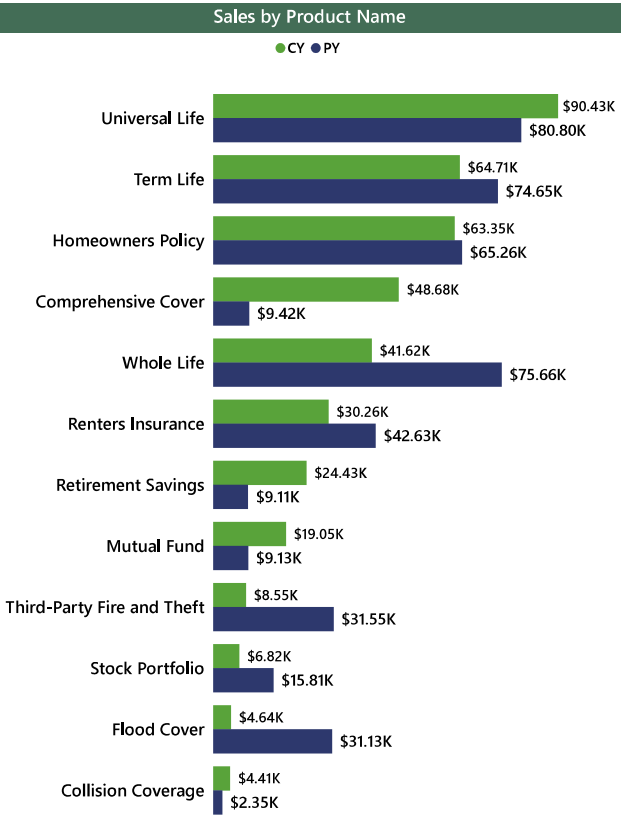
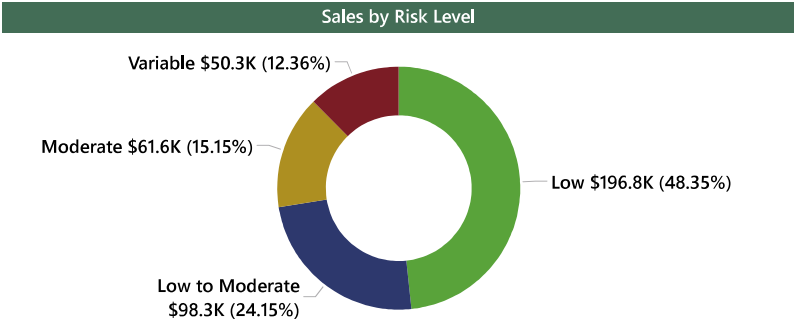
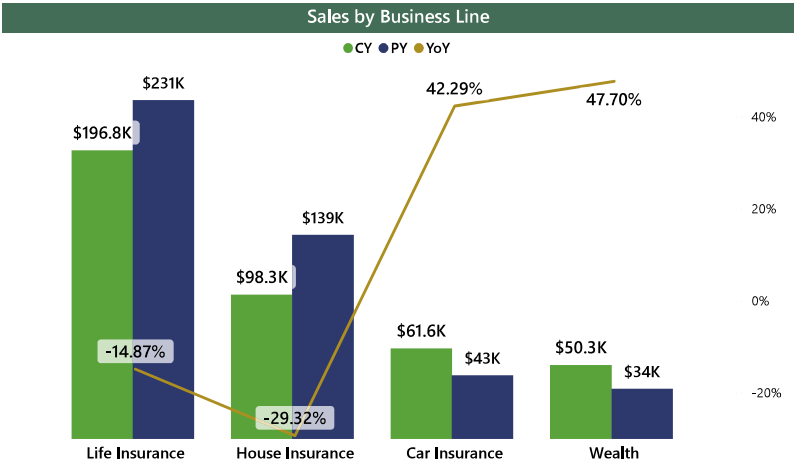
| CY Sales |           |
|----------|-----------|
| \$407K   |           |
| PY Sales | YoY Sales |
| \$448K   | -9.06%    |

| CY Withdrawals |                 |
|----------------|-----------------|
| \$103K         |                 |
| PY Withdrawals | YoY Withdrawals |
| \$40K          | 157%            |

| CY Net Sales |               |
|--------------|---------------|
| \$304K       |               |
| PY Net Sales | YoY Net Sales |
| \$407K       | -25%          |

Select measure to see breakdowns :

|       |             |           |
|-------|-------------|-----------|
| Sales | Withdrawals | Net Sales |
|-------|-------------|-----------|





Wealth Business Line

| Mutual Fund Sales |           |
|-------------------|-----------|
| \$19K             |           |
| PY Sales          | YoY Sales |
| \$9K              | 108.60%   |

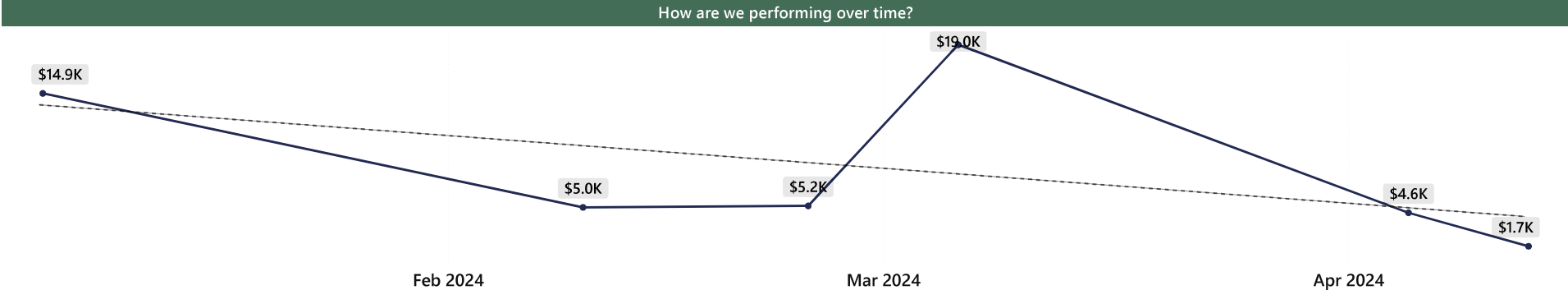
| Retirement Saving Sales |           |
|-------------------------|-----------|
| \$24K                   |           |
| PY Sales                | YoY Sales |
| \$9K                    | 168.05%   |

| Stock Portfolio Sales |           |
|-----------------------|-----------|
| \$7K                  |           |
| PY Sales              | YoY Sales |
| \$16K                 | -56.86%   |

Select measure to see breakdowns :

|       |             |           |
|-------|-------------|-----------|
| Sales | Withdrawals | Net Sales |
|-------|-------------|-----------|

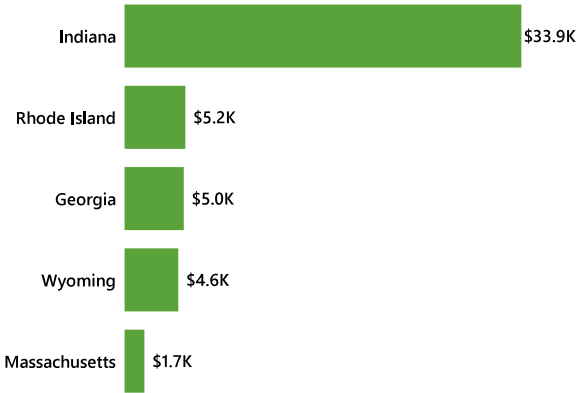
How are we performing over time?



Breakdown by Contact Type



Which region is selling the most?



| Advisor Details   |          |          |           |         |
|-------------------|----------|----------|-----------|---------|
| Advisor Name      | CY       | PY       | Diff      | YoY     |
| Sharon Johnson    | \$33,901 | \$9,131  | \$24,769  | 271.26% |
| Benjamin Robinson | \$5,152  | \$14,973 | (\$9,821) | -65.59% |
| Sarah Hodge       | \$5,022  | \$5,502  | (\$480)   | -8.73%  |
| Kelly Rogers      | \$4,558  | \$3,613  | \$945     | 26.17%  |
| Jennifer Harmon   | \$1,668  | \$837    | \$831     | 99.19%  |
| Total             | \$50,301 | \$34,057 | \$16,244  | 47.70%  |



Select measure to see performance over time :

Sales

Withdrawals

Net Sales

Car

Collision Coverage Sales

\$4K

PY Sales

\$2K

YoY Sales

87.45%

Comprehensive Cover Sales

\$49K

PY Sales

\$9K

YoY Sales

416.77%

Third-Party Fire and Theft..

\$9K

PY Sales

\$32K

YoY Sales

-72.90%

Home

Flood Cover Sales

\$5K

PY Sales

\$31K

YoY Sales

-85.09%

Homeowners Policy Sales

\$63K

PY Sales

\$65K

YoY Sales

-2.93%

Renters Insurance Sales

\$30K

PY Sales

\$43K

YoY Sales

-29.00%

Life

Term Life Sales

\$65K

PY Sales

\$75K

YoY Sales

-13.32%

Universal Life Sales

\$90K

PY Sales

\$81K

YoY Sales

11.92%

Whole Life Sales

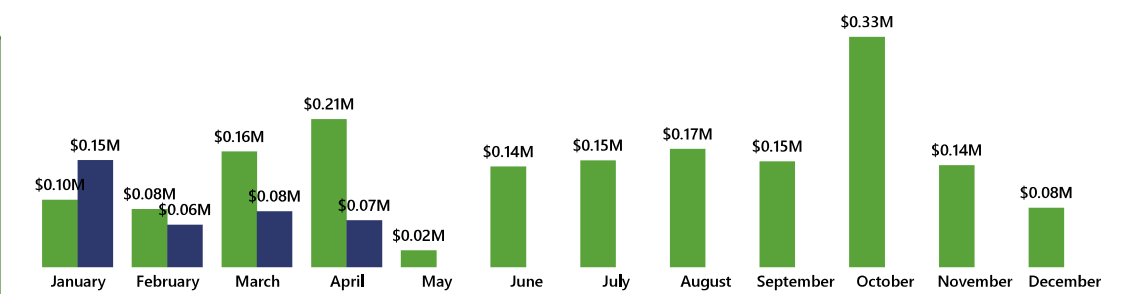
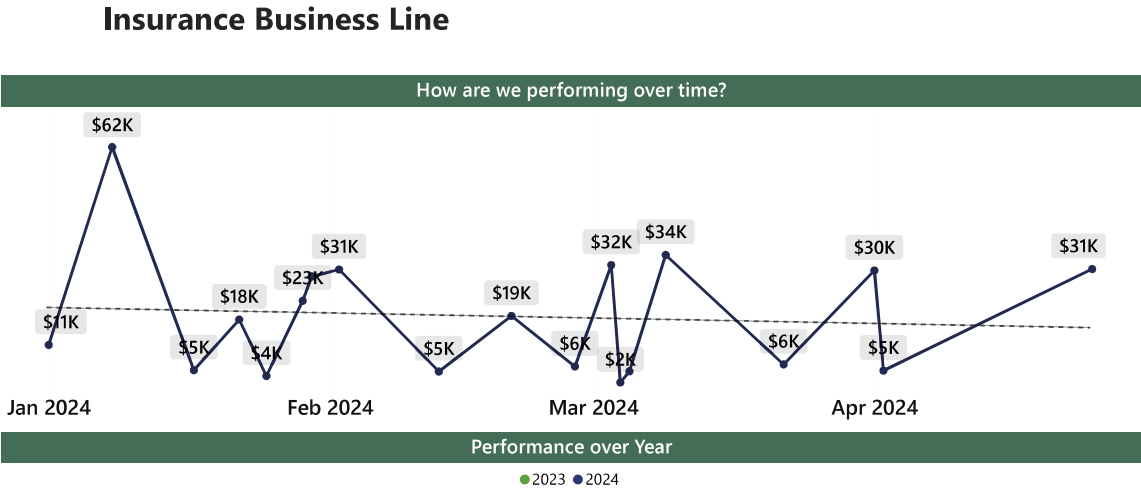
\$42K

PY Sales

\$76K

YoY Sales

-45.00%



| Advisor Details   |            |            |            |         |
|-------------------|------------|------------|------------|---------|
| Advisor Name      | CY         | PY         | Diff       | YoY     |
| Charles Morris    | \$1,36,604 | \$57,265   | \$79,339   | 138.55% |
| Benjamin Robinson | \$1,22,218 | \$85,200   | \$37,018   | 43.45%  |
| Sharon Johnson    | \$33,661   | \$11,574   | \$22,087   | 190.84% |
| Adam Robinson     | \$22,886   |            | \$22,886   |         |
| Kelly Rogers      | \$18,835   | \$51,674   | (\$32,839) | -63.55% |
| Jennifer Harmon   | \$11,108   | \$84,777   | (\$73,669) | -86.90% |
| Total             | \$3,56,656 | \$4,13,457 | (\$56,801) | -13.74% |