

HOME

LOAN ANALYSIS

DEPOSIT ANALYSIS

SUMMARY

All Time

Last 30 D

Last 90 D

Last 3 M

Last 6 M

Last 12 M

Last 24 M

CM

CQ

CY

Banking Relationship

Private Bank

Gender

Male

Investment Advisor

All

Total Deposit

\$855.8M



Bank Deposit

\$457.17M



Foreign Currency Amount

\$20.85M



Saving Account Amount

\$163.27M



Checking Account Amount

\$214.52M

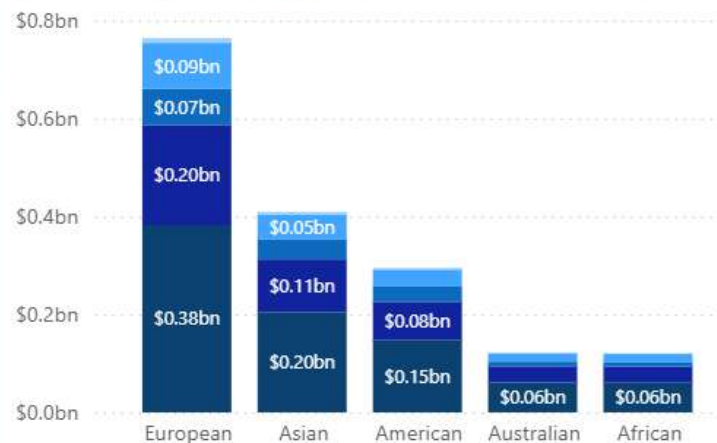


Bank Deposit by Income Band

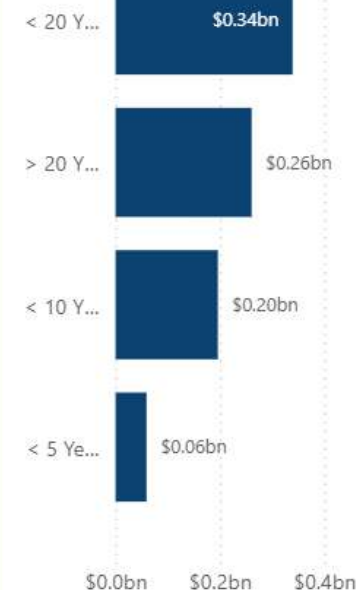
Mid	Low
\$258.9M	\$99.5M
	High
	\$98.77M

Total Deposit, Bank Deposit, Savings Account, Checking Accounts and Foreign Currency Account by Nationality

● Total Deposit ● Bank Deposit ● Savings Acco... ● Checking A... ● Foreign Curr...



Total Deposit by Engagement Timeframe





Banking Relationship

Private Bank

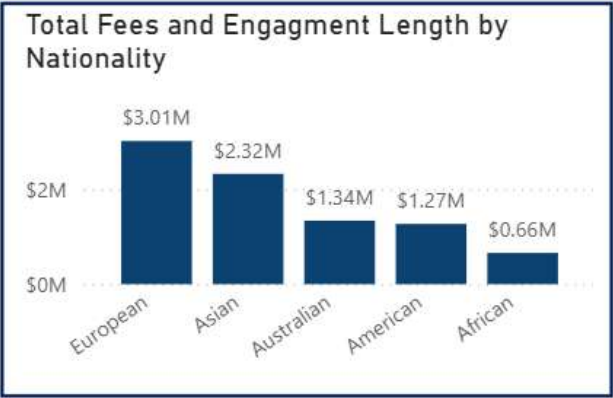
Gender

Male

Investment Advisor

All

Name	Investment Advisor	Engagment Length	Total Fees	Total CC Amount	Credit Cards Balance
Aaron Russell	Carl Anderson	\$2,403.00	\$43,944.34	\$1.00	\$3,129.72
Alice Watson	Victor Rogers	\$3,587.00	\$27,179.91	\$1.00	\$738.75
Amy Hawkins	Jeremy Porter	\$6,483.00	\$21,331.95	\$1.00	\$1,454.66
Amy Martinez	Peter Castillo	\$3,955.00	\$28,397.05	\$1.00	\$493.32
Amy Sims	Fred Bryant	\$6,801.00	\$2,764.14	\$1.00	\$229.90
Andrea Anderson	Steve Sanchez	\$3,443.00	\$54,988.10	\$1.00	\$469.59
Andrea GoPKRales	Nicholas Ward	\$4,036.00	\$4,812.42	\$3.00	\$646.35
Andrew Long	Steve Sanchez	\$4,727.00	\$12,138.62	\$1.00	\$2,462.62
Andrew Mills	Fred Bryant	\$1,683.00	\$1,13,964.73	\$1.00	\$4,882.13
Angela Lynch	Victor Gutierrez	\$2,683.00	\$92,284.81	\$1.00	\$4,100.08
Angela Ramos	Joe Carroll	\$6,617.00	\$12,764.65	\$1.00	\$1,294.00
Anna Shaw	Ernest Knight	\$2,192.00	\$10,660.46	\$1.00	\$4,011.98
Annie James	Victor Gutierrez	\$9,102.00	\$49,099.31	\$1.00	\$2,322.57
Anthony Berry	Victor Rogers	\$9,714.00	\$72,205.99	\$2.00	\$85.11
Anthony Green	Carl Anderson	\$4,935.00	\$23,971.98	\$1.00	\$550.75
Barbara Smith	Fred Bryant	\$8,356.00	\$1,55,770.87	\$2.00	\$6,875.06
Benjamin Price	Fred Bryant	\$2,052.00	\$19,417.21	\$2.00	\$762.54
Betty Davis	Joe Carroll	\$4,538.00	\$19,993.14	\$1.00	\$2,850.42
Billy Evans	Joe Carroll	\$1,889.00	\$63,008.34	\$2.00	\$1,241.98
Billy Perez	Nicholas Ward	\$1,345.00	\$12,117.60	\$2.00	\$94.77
Bobby Lee	Fred Bryant	\$2,121.00	\$15,005.07	\$1.00	\$3,571.20
Total		\$12,05,269.00	\$85,92,604.94	\$339.00	\$5,26,755.64





## BANKING DASHBOARD

LOAN DEPOSIT

DEPOSIT ANALYSIS

SUMMARY

All Time

Last 30 D

Last 90 D

Last 3 M

Last 6 M

Last 12 M

Last 24 M

CM

CQ

CY

Gender

Female

Male

Total Clients

1,474



Total Loan

\$2.19bn



Total Deposit

\$1.87bn



Total Fees

\$79.48M



Total CC Amount

\$2.17K



Saving Account Amount

\$353.04M



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CY

Banking Relationship

Private Bank

Gender

Male

Investment Advisor

All

Total Loan

\$980.16M



Bank Loan

\$406.24M



Business Lending

\$571.74M



Credit Cards

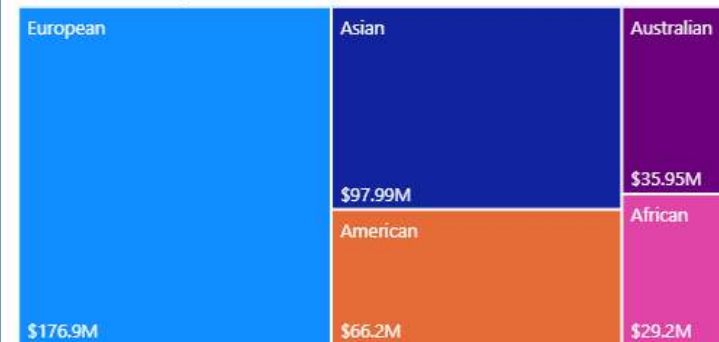
\$2.18M



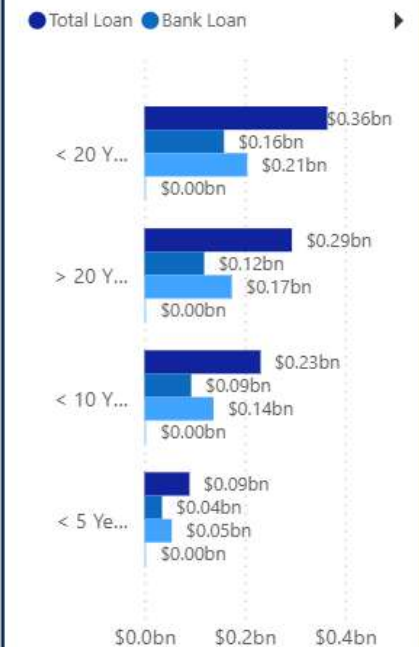
Bank Loan by Banking Relationship



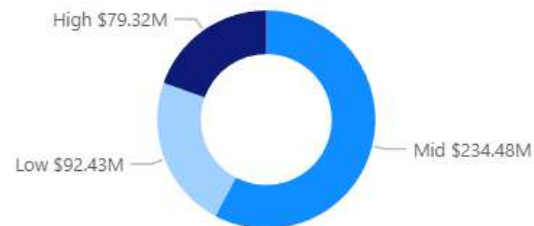
Bank Loan by Nationality



Total Loan, Bank Loan, Business Lending and Credit Cards Balance by Engagem...



Bank Loan by Income Band





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All Time

Last 30 D

Last 90 D

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Last 6 M

Last 12 M

Last 24 M

CM

CQ

CY

Banking Relationship

Private Bank

Gender

Male

Investment Advisor

All

Total Clients

672



Total Loan

\$980.16M



Bank Loan

\$406.24M



Business Lending

\$571.74M



Total Deposit

\$855.8M



Total Fees

\$35.89M



Bank Deposit

\$457.17M



Checking Account Amount

\$214.52M



Total CC Amount

\$969



Saving Account Amount

\$163.27M



Foreign Currency Amount

\$20.85M



Engagement Account

\$3.69M

