CD GLOBAL PANEL MEETING

**Date:** Friday, August 26, 2016 Time: 1:00PM-2:30PM

**Meeting attendees:** Iñigo R. Eunice A. Jarome A. Angelo A. Kyle C. Neah B. Raimehn R. Kim C. Jason C.

**Apologies:**

**Absent:** Andrian D. & Aira P.

**Agenda**

* To know and discuss current tasks

**Updates**

Eunice

* Advisor update
* Updating suppression list
* Extended field work fhf
* Performance assessments of Gelo and Kyle
* Database cleaning
* No current data mining

Neah (&Aira)

* Working on Burningpants content posts.
* Send-out statistics & Panel Survey Tracker.
* LS & e-Market-Email Campaign Statistics.
* Australia Advised Survey Sos
* Equip MS & FP Reminder

Rai

* Working on Burning Pants

Jason

* Working on Burning Pants

Gelo

* FHF- Almost done for 3rd batch of names and will proceed to 4th batch
* WA tasks
* Certified HNW  61  
  Likely HNW  159  
  Certified non HNW  181  
  Unknown  2904  
  Total  3305

Jarome

* Natixis project working with the Advisor and Institutional.
* Focus on European and middle east.

Kim

* Natixis project working with the Advisor and Institutional.

Kylie

* WA tasks
* Certified HNW  60  
  Likely HNW  244  
  Certified non HNW  349  
  Unknown  3365  
  Total  4018

Iñigo

* Performance assessments.

REVIEW PLAN AND ACTIONS:

* Continuance of each tasks and responsibilities efficiently