WEALTH & BANKING | Insights on Advisor Performance for Managers
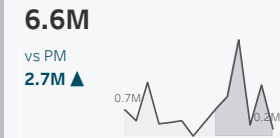
Select an advisor by clicking the "Settings" button to the right. Current selection: **Carrissa Battle**
These analyses are currency-agnostic and are available for international use from The Information Lab.

Agent ⚙

#9. ASSETS UNDER MANAGEMENT

6.6M

vs PM
2.7M ▲

7	Cristin Nunan	6.9M
8	Mag Phelps	6.7M
9	Carrissa Battle	6.6M
10	Cornie Pfeffer	6.3M
11	Bernelle Weatherhead	6.2M

#15. NUMBER OF ASSETS

16

vs PM
4 ▲

11	Herrick Savil	17
11	Hettie Bello	17
15	Carrissa Battle	16
15	Nancy Bowgen	16
15	Paxton Doubrava	16

#14. NUMBER OF CLIENTS

12

vs PM
2 ▲

9	Nancy Bowgen	13
9	Valerye Becom	13
14	Carrissa Battle	12
14	Herrick Savil	12
14	Hettie Bello	12

#7. AVERAGE PIPELINE DURATION

37 days

vs PM
5 ▼

14	Jada Dudman	37.5 days
15	Arlinda Goeff	37.5 days
16	Carrissa Battle	37.2 days
17	Hettie Bello	37.1 days
18	Woodrow Warr	36.8 days

#12. AVERAGE TIME IN STAGE

7.0 days

vs PM
0.1 ▲

10	Jada Dudman	7.0 days
11	Lorelei Jacquemot	7.0 days
12	Carrissa Battle	7.0 days
13	Paxton Doubrava	7.1 days
14	Hartwell Humes	7.2 days

TOP AT RISK ASSETS
Top 5 assets that remain in the pipeline

Client + Asset	AUM	Days in pipeline
Philip Checklin HEL-807	483.2K	33 d
Philip Checklin HEL-871	632.4K	17 d
Maribeth Glinde BIN-184	623.7K	32 d
Amy Tassell CAR-295	614.5K	32 d
Perry Tumilty GIB-834	552.4K	42 d

OVERDUE
Clients in onboarding stages > **10 days**

Client + Asset	Stage + days in stage
Daniella Lardeux MUL-496	Stage 5	**13 d**
Adore Stiven PAC-718	Stage 3	**12 d**
Amy Tassell CAR-261	Stage 5	**12 d**
Perry Tumilty GIB-834	Stage 5	**12 d**
Reggi Messier LED-495	Stage 3	**11 d**
Vida Hills HIL-785	Stage 5	**11 d**