

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 MUL-785 | Stage 5 11 d |