

WEALTH & BANKING | Insights on Advisor Performance for Managers

Select an advisor by clicking the “Settings” button to the right. Current selection: Cristin Nunan  
These analyses are currency-agnostic and are available for international use from The Information Lab.

#7. ASSETS UNDER MANAGEMENT

6.9M

vs PM  
-2.4M ▼

5

Arlinda Goeff

7.0M

6

Herrick Savil

7.0M

7

Cristin Nunan

6.9M

8

Mag Phelps

6.7M

9

Carrissa Battle

6.6M

#3. NUMBER OF ASSETS

26

vs PM  
-6 ▼

1

Hymie Really

30

2

Woodrow Warr

29

3

Cristin Nunan

26

4

Glenden Carmichael

22

5

Pebrook Smallpeace

21

#4. NUMBER OF CLIENTS

18

vs PM  
-4 ▼

2

Hymie Really

20

2

Woodrow Warr

20

4

Cristin Nunan

18

4

Glenden Carmichael

18

6

Cornie Pfeffer

14

#19. AVERAGE PIPELINE DURATION

38 days

vs PM  
5 ▲

11

Nancy Bowgen

37.9 days

12

Tiebout Andreini

37.9 days

13

Cristin Nunan

37.7 days

14

Jada Dudman

37.5 days

15

Arlinda Goeff

37.5 days

#25. AVERAGE TIME IN STAGE

8.2 days

vs PM  
0.9 ▲

21

Pebrook Smallpeace

7.5 days

22

Mag Phelps

7.7 days

23

Cornie Pfeffer

7.8 days

24

Hettie Bello

7.9 days

25

Cristin Nunan

8.2 days

OVERDUE

Clients in onboarding stages > 10 days

Client + Asset	Stage + days in stage
Hetty Dunkerton WIL-223	Stage 1   14 d
Sophonra Jados WIL-46	Stage 1   14 d
Dame O'Shaughnessy COR-543	Stage 1   13 d
Selene Arzu DIC-215	Stage 5   13 d
Mirilla Abrahamson SWI-344	Stage 5   13 d
Mirilla Abrahamson SWI-728	Stage 5   12 d

TOP AT RISK ASSETS

Top 5 assets that remain in the pipeline

Client + Asset	AUM	Days in pipeline
Dame O'Shaughnessy COR-543	598.5K	13 d
Dame O'Shaughnessy COR-808	470.1K	46 d
Taylor Clemson HOD-682	549.5K	42 d
Selene Arzu DIC-215	497.3K	47 d
Liz Gencke YUN-126	347.8K	27 d