### Module 10.1 Milestone #3 – Willson Financial Case Study

Spring 2025 CSD310 Database Development and Use

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### Willson Financial Case Study

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Report 1: New Client Growth

This report addresses the business need to track the number of new clients added per month over the last six months, which is essential for measuring growth.

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Report 2: Average Assets Per Client

This report calculates each client's average total asset value, providing a key performance indicator for the firm’s management portfolio.

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Report 3: High-Transaction Clients

This report identifies highly active clients with over 10 transactions in the current month. This is vital for analyzing whether the current billing structure suits these “power users.”

