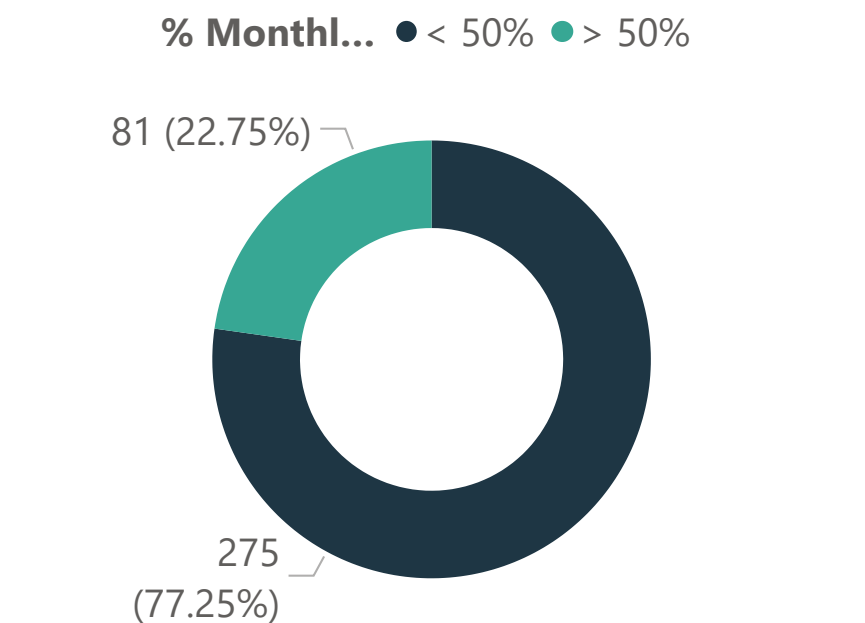


# Opportunity Radar - Banking Clients

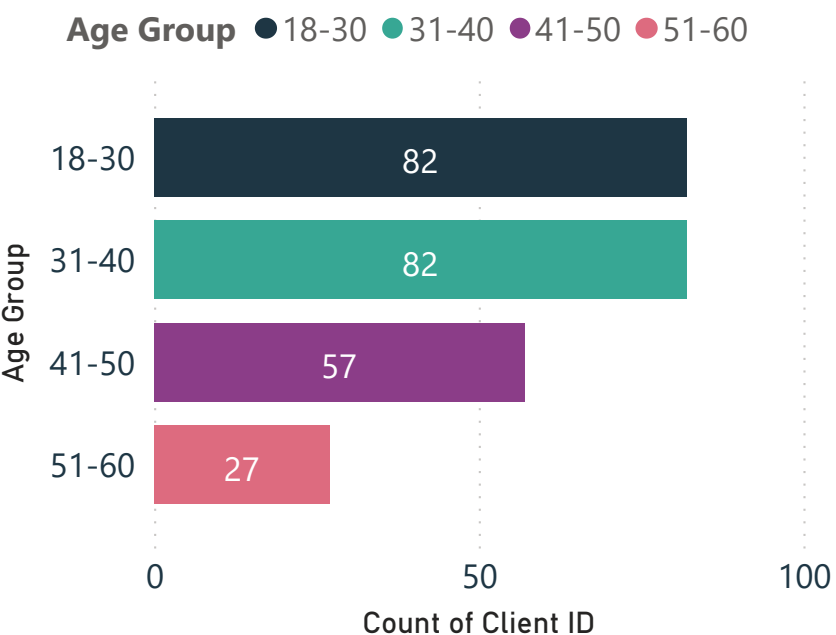
No. of Clients by % Payment of Outstanding Balance of Credit Card



Type of Credit Card

High Interest Low Interest

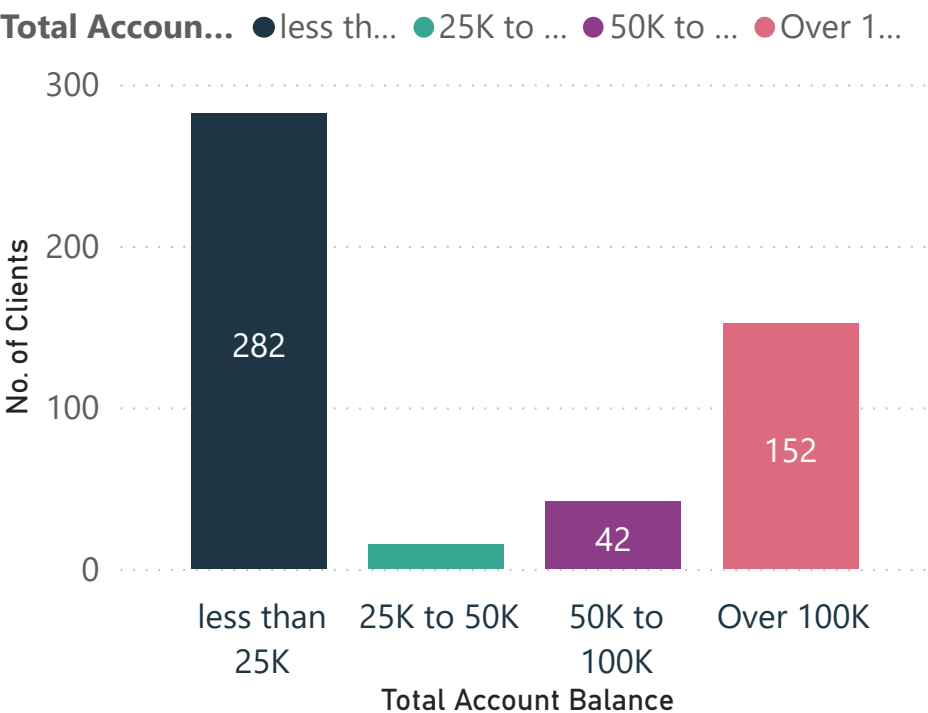
No. of Clients with Mortgage by Age Group



Insurance

No Yes

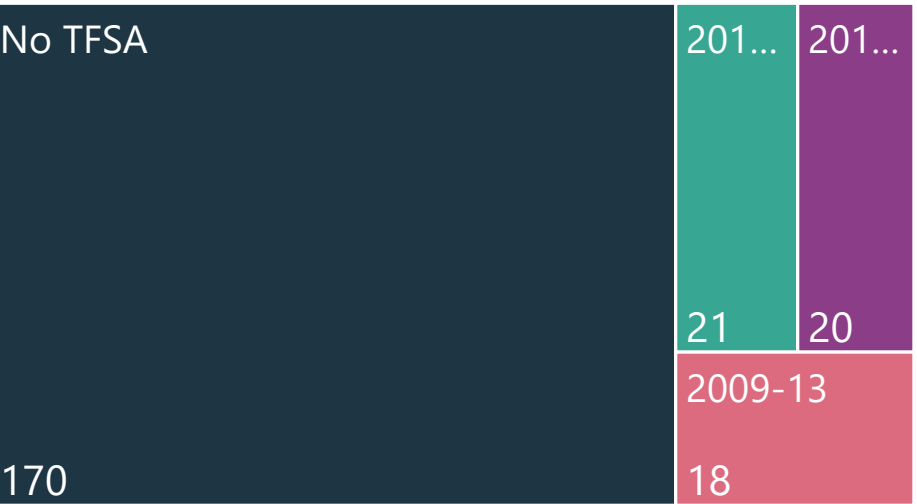
No. of Clients by Total Account Balance



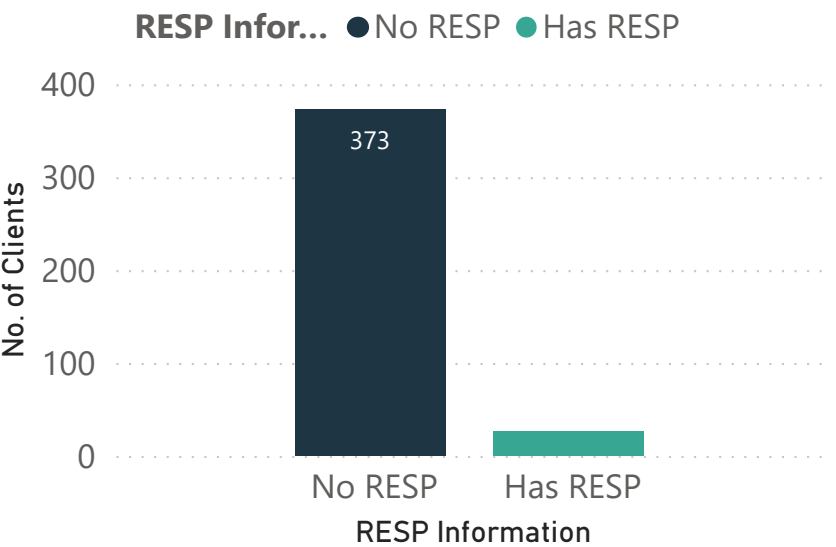
Last Contact Period

<180 Days >180 Days

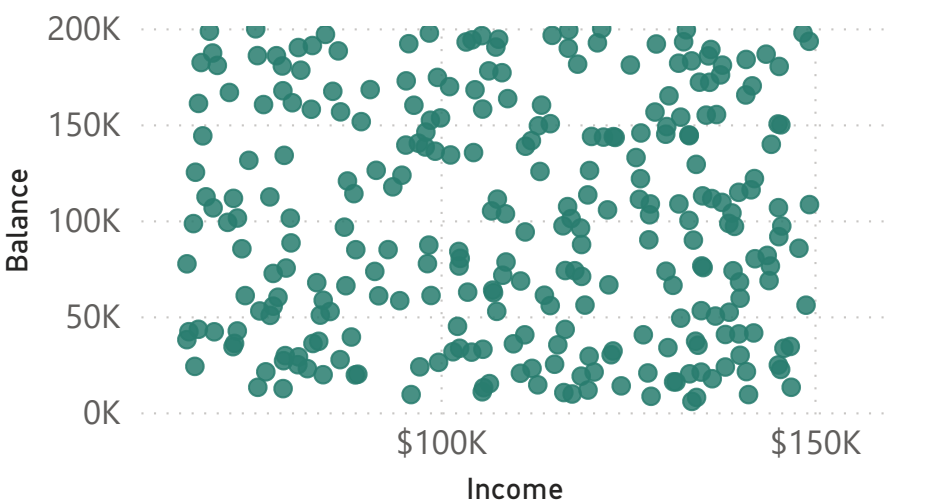
No. of Clients- TFSA Info by Account open Date



No. of Clients - RESP Information



Client Info by Income and RRSP Account Balance





# Clients List - TFSA Accounts

106

Number of Clients

Client Name	Client ID	TFSA Open Date
Client name 57	1032	2018-21
Client name 40	1163	2018-21
Client name 101	1245	2018-21
Client name 462	1247	2018-21
Client name 164	1271	2018-21
Client name 280	1288	2018-21
Client name 26	1377	2018-21
Client name 72	1432	2018-21
Client name 130	1437	2018-21
Client name 384	1458	2018-21
Client name 110	1513	2018-21
Client name 474	1574	2018-21



# Clients List - Account Balances

282

Number of Clients

Name	Client ID	Account Balance
Client name 1	1021	less than 25K
Client name 10	8076	less than 25K
Client name 100	4993	less than 25K
Client name 101	1245	less than 25K
Client name 102	4643	less than 25K
Client name 103	3245	less than 25K
Client name 104	3979	less than 25K
Client name 105	5664	less than 25K
Client name 106	1027	less than 25K
Client name 107	2566	less than 25K
Client name 108	9499	less than 25K
Client name 109	9669	less than 25K



# Clients - RESP Accounts

511

Number of Clients

Client Name	Client ID	RESP Info
Client name 99	7366	No RESP
Client name 98	2841	No RESP
Client name 97	6857	No RESP
Client name 96	9156	No RESP
Client name 95	6712	No RESP
Client name 94	4685	No RESP
Client name 93	7692	No RESP
Client name 92	3250	No RESP
Client name 91	6305	No RESP
Client name 90	9224	No RESP
Client name 9	5437	No RESP
Client name 89	3956	No RESP



# Clients List - Credit Card Information

81

Number of Clients


Name	Client ID	Account Type	% Monthly Payment of Outstanding Balance
Client name 459	1009	High Interest	> 50%
Client name 55	1078	High Interest	> 50%
Client name 283	1113	High Interest	> 50%
Client name 346	1147	High Interest	> 50%
Client name 101	1245	High Interest	> 50%
Client name 462	1247	High Interest	> 50%
Client name 289	1332	High Interest	> 50%
Client name 262	1616	High Interest	> 50%
Client name 499	1921	High Interest	> 50%
Client name 353	2112	High Interest	> 50%
Client name 444	2668	High Interest	> 50%



# Clients List - Mortgage Insurance

82

Number of Clients

 Name	Client ID	Age Group	Insurance
Client name 10	8076	31-40	Yes
Client name 103	3245	31-40	Yes
Client name 107	2566	31-40	Yes
Client name 111	8620	31-40	No
Client name 12	1867	31-40	No
Client name 131	2067	31-40	No
Client name 132	9637	31-40	Yes
Client name 135	6495	31-40	No
Client name 148	9341	31-40	No
Client name 154	5733	31-40	No
Client name 162	3004	31-40	Yes



# Clients List - Income > \$100K & RRSP Balance < \$25K

27

RRSP clients as per Account Balance & Income

Name	Client ID	Income	RRSP Balance
Client name 101	1245	\$133,617	5,700
Client name 144	1372	\$134,233	7,750
Client name 475	8255	\$128,151	8,350
Client name 148	9341	\$141,185	9,250
Client name 476	6792	\$117,600	9,550
Client name 435	9891	\$116,484	10,300
Client name 154	5733	\$105,580	10,700
Client name 458	5660	\$119,720	11,600
Client name 133	5684	\$105,764	12,850
Client name 49	9336	\$146,893	13,051
Client name 7	7645	\$124,160	13,786
Client name 44	8482	\$112,000	14,227