**Module 10: Echo Group Project**

Wilson Financial case study

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**Report 1: How many clients have been added for each of the past six months?**The following fields are required to answer this question:

* Table *client*
  + client\_id
  + name
  + relationship\_manager
  + account\_creation\_date (account created less than 6 months ago)
  + status (we only consider active clients)
* Table *employee*
  + name (to get the name of the relationship manager)

**Report 2: What is the average amount of assets (in currency) for the entire client list?**The following fields are required to answer this question:

* Table *asset\_under\_management*
  + status (to filter for active investments)
  + currency (to group by currency)
  + amount (to calculate the average)

**Report 3: How many clients have a high number (more than 10 a month) of transactions?**The following fields are required to answer this question:

* Table *transaction*
  + client\_id (to count the number of transactions)
  + transaction\_date (to filter for records younger than 1 month)
* Table client
  + name