

WEALTH & BANKING | Advisor Performance

Selected Advisor: Bernelle Weatherhead

Settings ⚙

#11. ASSETS UNDER MANAGEMENT

6.2M

vs PM

1.4M ▲

9 Carrissa Battle

£6.6M

10 Cornie Pfeffer

£6.3M

11 Bernelle Weatherhead

£6.2M

12 Nancy Bowgen

£6.2M

13 Valerye Becom

£6.1M

#20. AVERAGE TIME IN STAGE

7.5 days

vs PM

-0.3 ▼

18 Hymie Really

7.4 days

19 Woodrow Warr

7.4 days

20 Bernelle Weatherhead

7.5 days

21 Pebrook Smallpeace

7.5 days

22 Mag Phelps

7.7 days

#7. NUMBER OF ASSETS

18

vs PM

2 ▲

5 Pebrook Smallpeace

21

6 Arlinda Goeff

20

7 Bernelle Weatherhead

18

11 Alonzo Chessel

17

11 Cornie Pfeffer

17

AVERAGE TIME IN STAGE

Compared to avg.

SLA COMPLETION (%) | Incomplete

Complete: 84.6%

Incomplete: 15.4%

#17. NUMBER OF CLIENTS

11

vs PM

-3 ▼

14 Reed Claibourn

12

14 Tiebout Andreini

12

17 Bernelle Weatherhead

11

17 Kristyn Raylton

11

17 Lorelei Jacquemet

11

OVERDUE

Clients in onboarding stages > 10 days

Client + Asset	Stage + days in stage
Rubi Fernandes STA-940	Stage 3   14 d
Rubi Fernandes STA-513	Stage 3   13 d
Fanechka Yallowley KON-696	Stage 3   13 d
Margot Messenger TIL-896	Stage 3   13 d
Marlowe Norfolk JAS-165	Stage 5   13 d

TOP AT RISK ASSETS

Top 5 assets that remain in the pipeline

Client + Asset	AUM	Days in pipeline
Humberto Tarquini TIL-724	643.6K	3 d
Sidney McLaren O'K-313	618.5K	30 d
Marlowe Norfolk JAS-165	517.0K	39 d
Maximilian Greenhow BAT-494	500.5K	13 d
Margot Messenger TIL-896	470.7K	34 d

#10. AVERAGE PIPELINE DURATION

39 days

vs PM

5 ▼

2 Paxton Doubrava

40.6 days

3 Hymie Really

40.2 days

4 Bernelle Weatherhead

39.3 days

5 Kristyn Raylton

39.1 days

6 Cornie Pfeffer

39.0 days