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|  | **Specific Areas Most Important to Address We Need To…** | **Action Steps to Proceed (Specifically, how are you going to do this?)** | **Specific Challenges/Obstacles (Yours, Mine, Ours)** | **Accountability?**  **Person Date** | |  |
| 1 | **Create New Rotation**  **Week 1 – North Jersey/NYC**  **Week 2 – South Jersey/Philly**  **Week 3 – New England(CT/MA/RI)**  **Week 4 – Michigan**  **Week 5 – Pitt/Ohio**  **Week 6 – Misc** | More concentrated effort on building out a 6 week rotation, instead of just taking meetings where I can get them. | Normal scheduling issues, don’t think I should run into any budget problems with this rotation | Reed | Monthly | Rotation stays pretty much the same, VT is a potential opportunity because of Brad Miller, should be able to get some UBS business. Need to try and penetrate MA/CT more |
| 2. | **Create a list of 50 targeted reps that can legitimately do $1,000,000 in business by December 2022** | See attached. Make sure Svigel and I are dripping on these reps every month | Moving people out of cash | Reed | Monthly | Updated, added a few, removed a couple where we lost out. |
| 3. | **Hosting at least 1 large group meeting every quarter** | Schedule out Stifel/OpCo/Wells | Wells seems to be the biggest challenge of these 3, have decent success getting into the others on consistent basis | Reed | Quarterly | Have been able to do this and will continue |
| 4. | **Spend 75% of appointments in focus firms.**  **LPL, Raymond James, Wells Fargo, Securities America, GWN** | Create targeted scheduling list. Also include American Portfolio and Lincoln advisers that do MF biz |  | Reed | Monthly | No change here, same focus. If Lincoln comes on board will be a big Q4 push. |
| 5. | **Cold Calls – weekly total.** | 25 a week, 5 a day | Discipline to do it, especially on heavy travel weeks. | Reed | Monthly | Need to do a better job of this. I’m going to focus solely on AP and Lincoln, US Income |
| 6. | **Securities America Targeted E-Mails** | 1 firm per week | Getting firm lists with email addresses. | Reed- | Monthly | Hope to do this with bond yield email. |