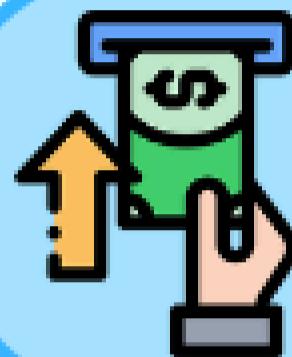


BANKING DATA ANALYSIS DASHBOARD



DEPOSIT ANALYSIS



LOAN ANALYSIS



SUMMARY



TOTAL CLIENT
2940

Female

Male



TOTAL LOAN
4.38bn



TOTAL DEPOSIT
3.77bn



TOTAL CC AMOUNT
4391



TOTAL FEES
158.19M



SAVING ACC AMOUNT
698.73M

[HOME](#)[DEPOSIT ANALYSIS](#)[LOAN ANALYSIS](#)[SUMMARY](#)

Female

Male

BANKING RELATIONSHIP[All](#)**NAME**[All](#)**INVESTMENT ADVISOR**[All](#)**TOTAL DEPOSIT****3.77bn****BANK DEPOSIT****2.01bn****SAVING ACCOUNT AMOUNT****698.73M****CHECKING ACCOUNT AMOUNT****963.28M****Bank Deposit by Income Band**

Mid

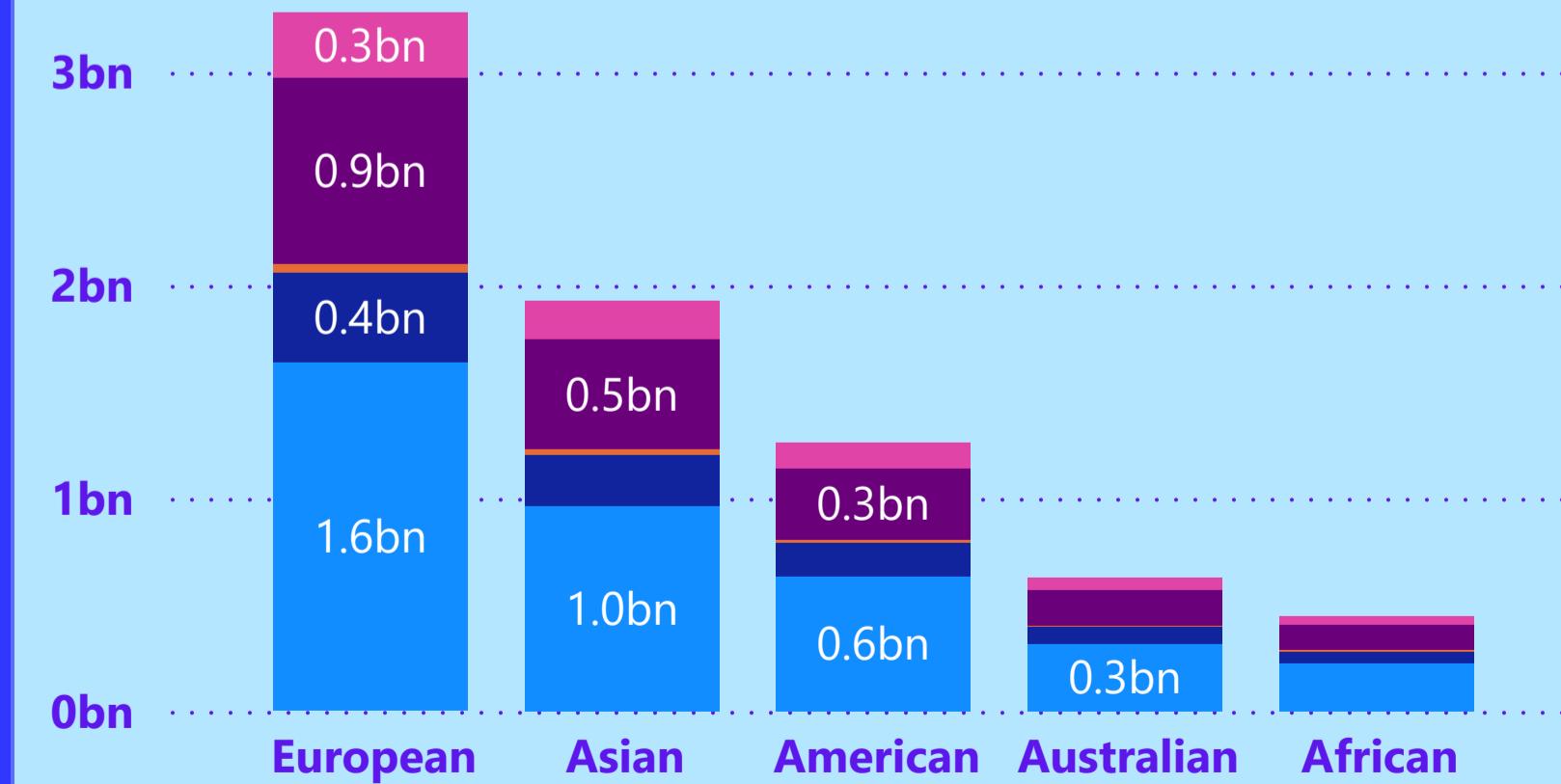
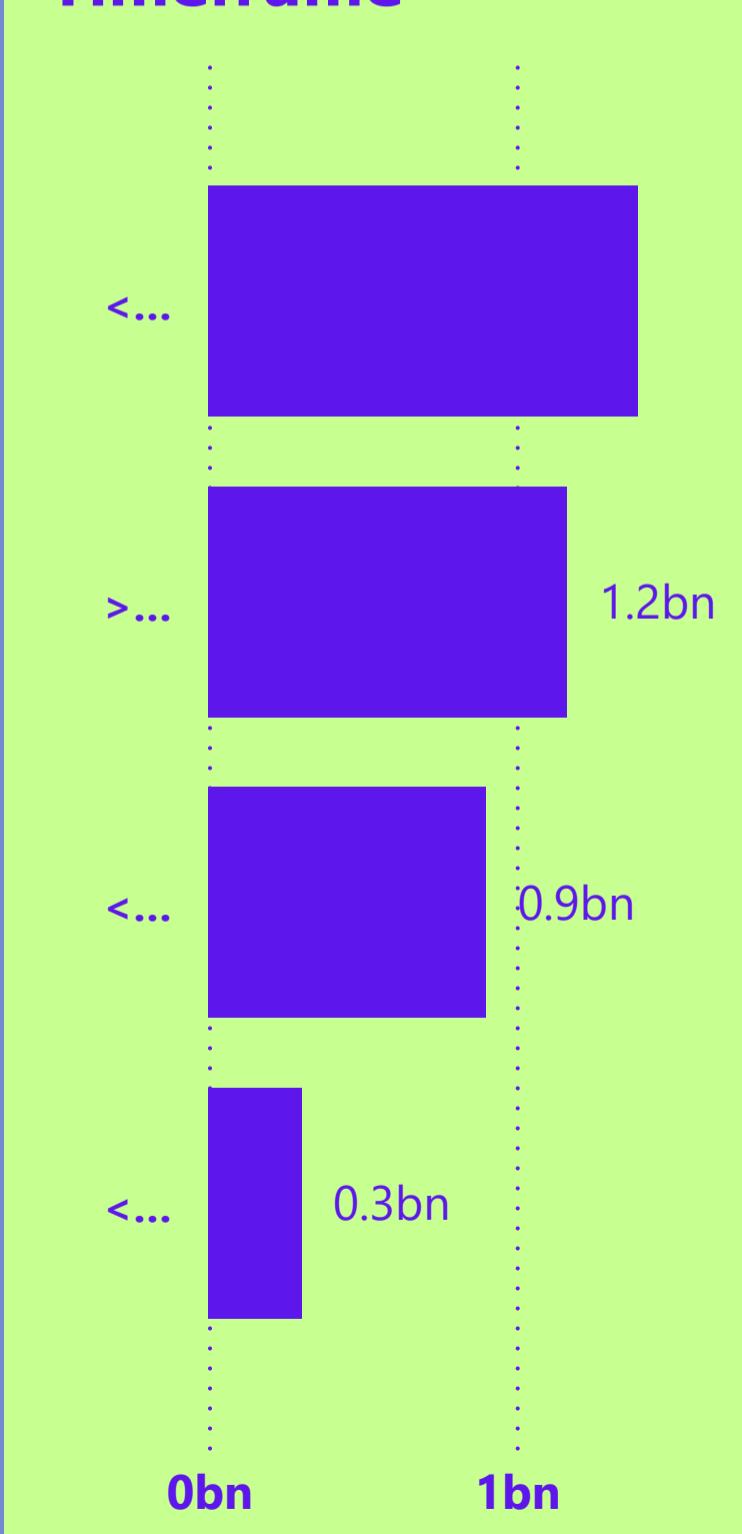
Low

High

1.09bn

0.50bn

0.42bn

FOREIGN CURRENCY AMOUNT**89.65M****Total Deposit, Checking Accounts, Foreign Currency Account, Bank Deposit and Savings Account by Nationality****● Total De... ● Checkin... ● Foreign ... ● Bank De... ● Savings ...****Total Deposit by Engagement Timeframe**

[HOME](#)[DEPOSIT ANALYSIS](#)[LOAN ANALYSIS](#)[SUMMARY](#)

Female

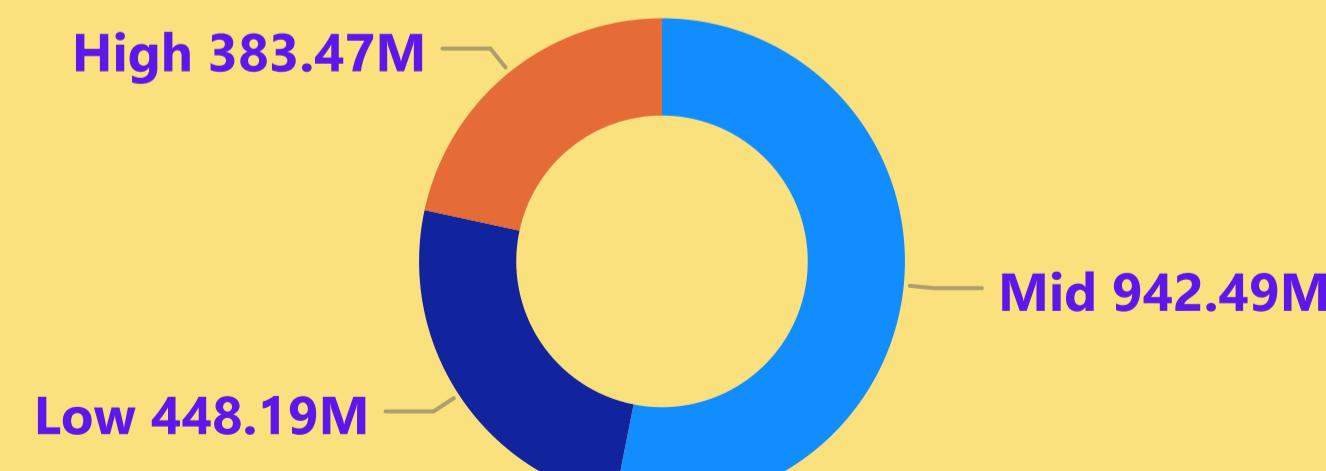
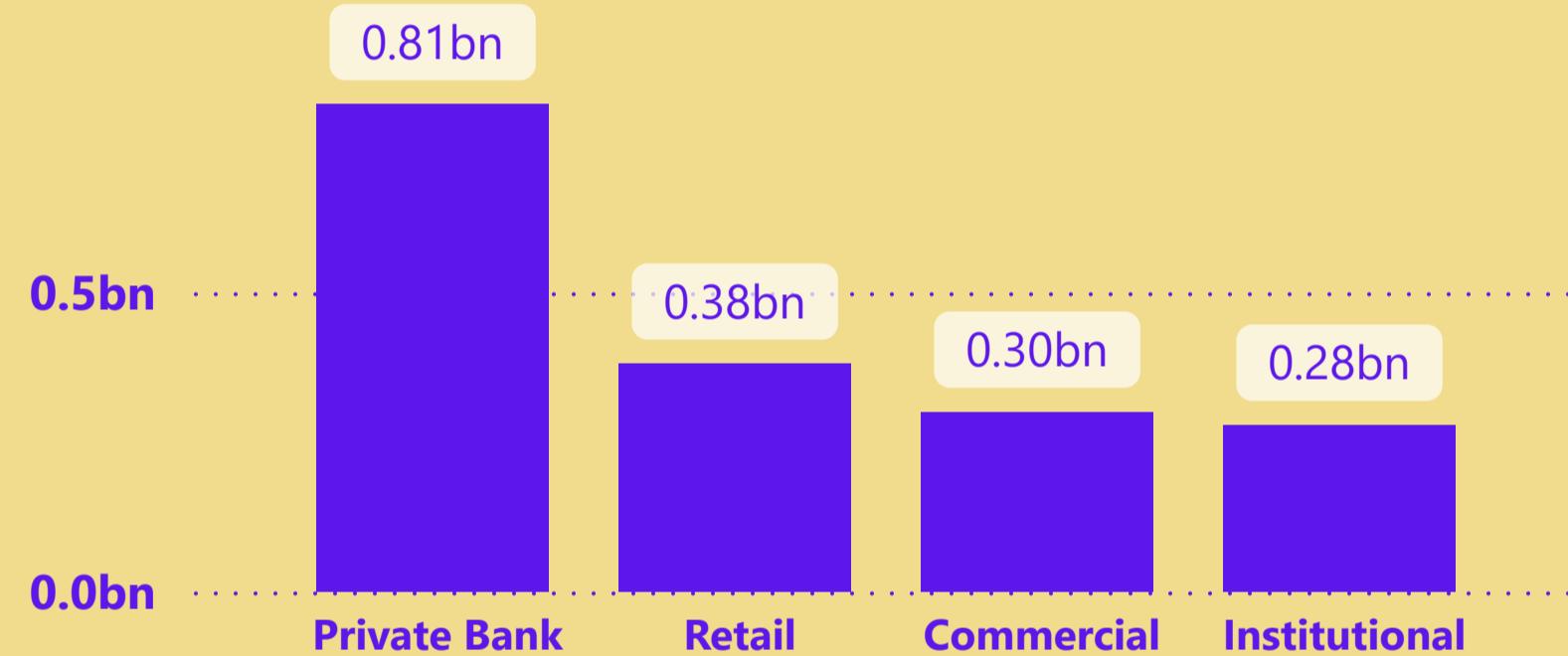
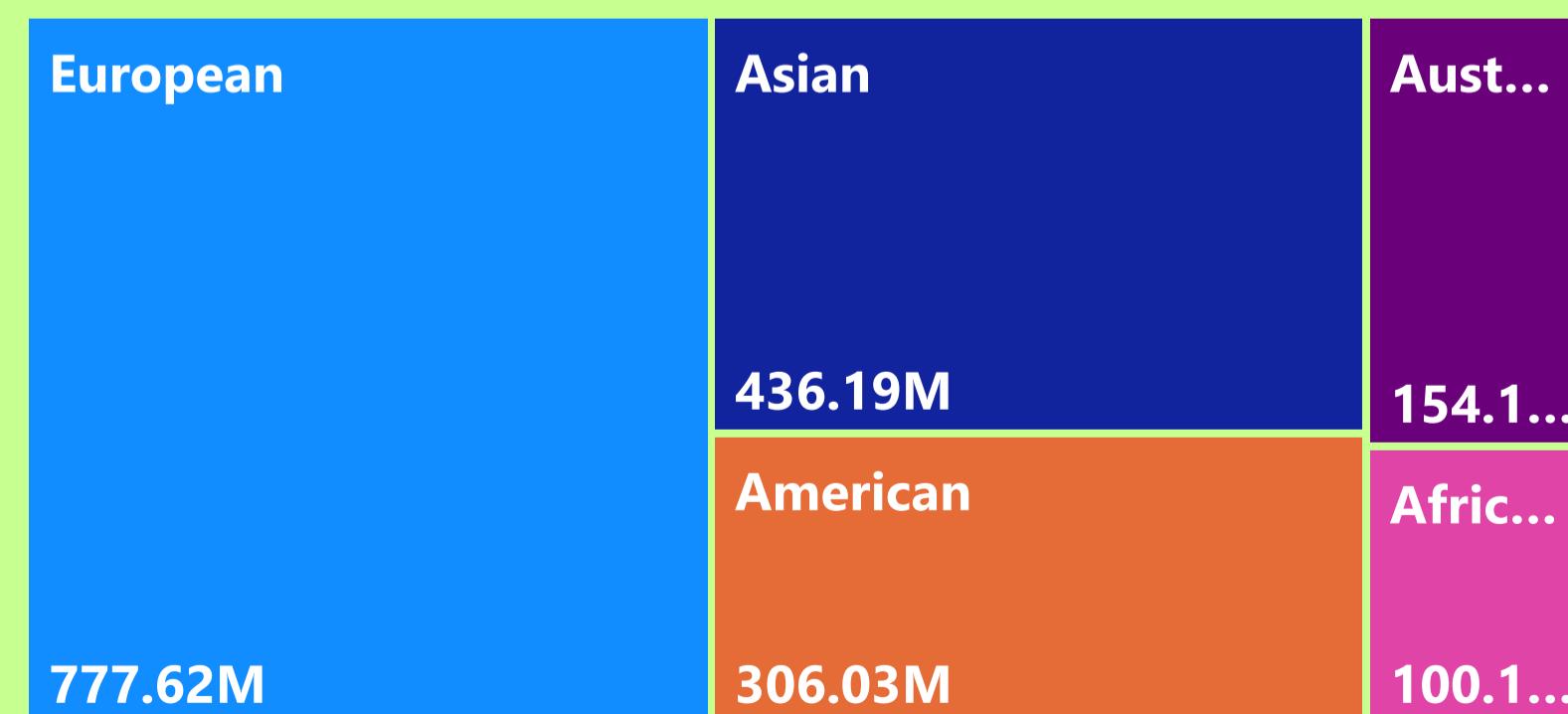
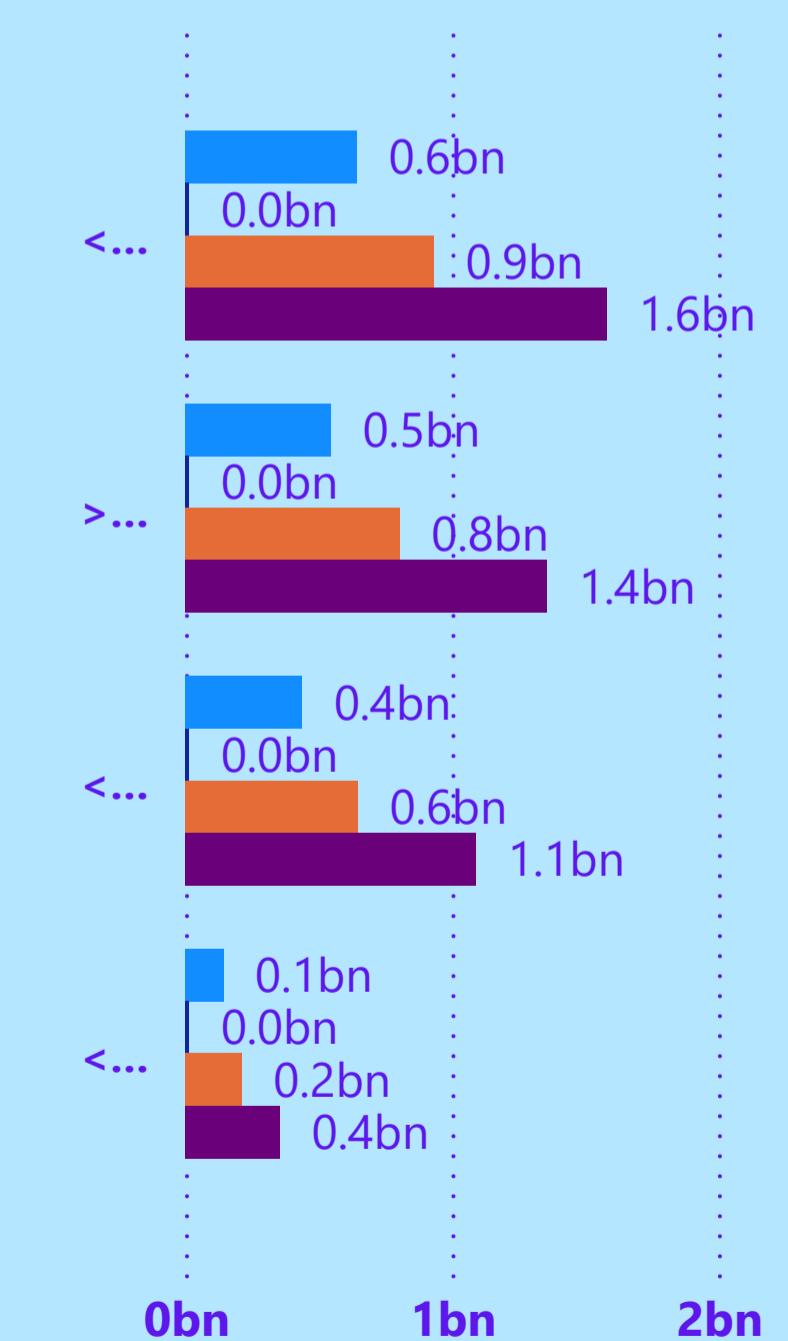
Male

BANKING RELATIONSHIP[All](#)**NAME**[All](#)**INVESTMENT ADVISOR**[All](#)**TOTAL LOAN**

4.38bn**BANK LOAN**

1.77bn**BUSINESS LENDING**

2.60bn**CREDIT CARDS**

9.53M**Bank Loan by Income Band****Bank Loan by Banking Relationship****Bank Loan by Nationality****Bank Loan, Credit Cards Balance, Business Lending and...****Bank Loan** ● **Credit Cards ...** ►

[HOME](#)[DEPOSIT ANALYSIS](#)[LOAN ANALYSIS](#)[SUMMARY](#)

Female

Male

BANKING RELATIONSHIP

All

NAME

All

INVESTMENT ADVISOR

All

TOTAL CLIENT



2940

TOTAL LOAN



4.38bn

BANK LOAN



1.77bn

BUSINESS LENDING



2.60bn

TOTAL DEPOSIT



3.77bn

TOTAL FEES



158.19M

BANK DEPOSIT



2.01bn

CHECKING ACCOUNT AMOUNT



963.28M

TOTAL CC AMOUNT



4391

SAVING ACCOUNT AMOUNT



698.73M

FOREIGN CURRENCY AMOUNT



89.65M

ENGAGEMENT ACCOUNT



17M

HOME

DEPOSIT ANALYSIS

LOAN ANALYSIS

SUMMARY



Female

Male

BANKING RELATIONSHIP

All



NAME

All



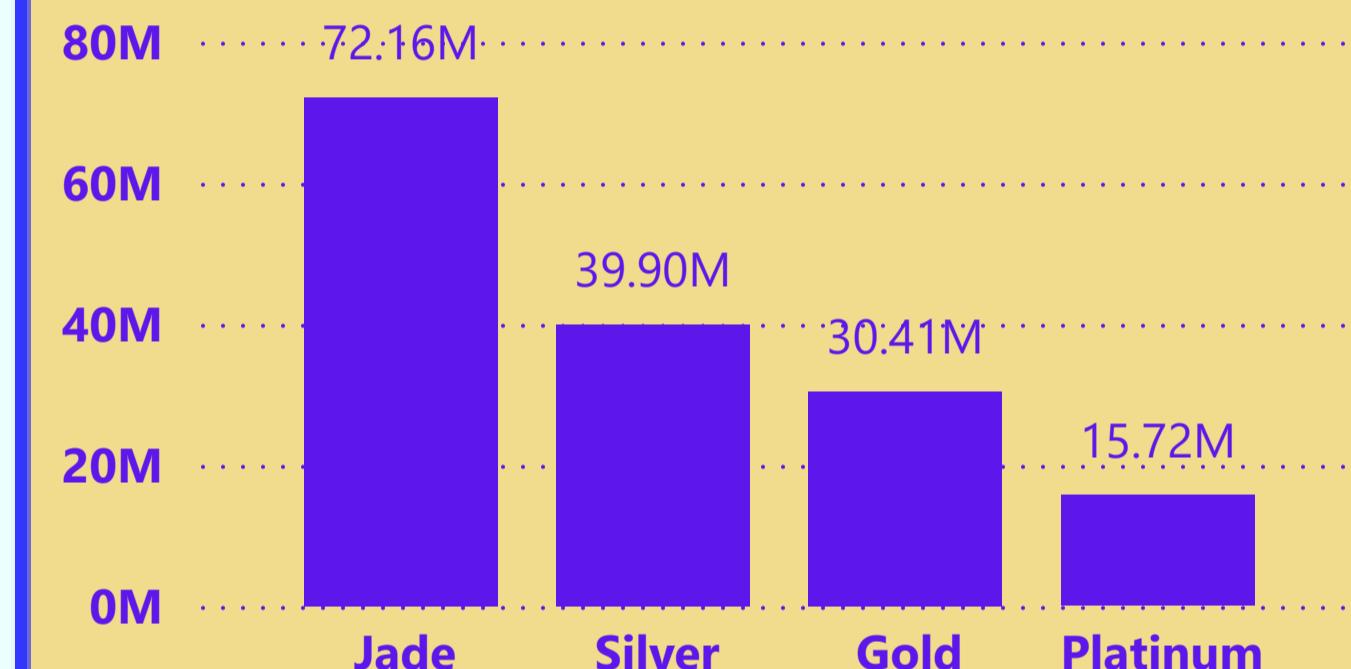
INVESTMENT ADVISOR

All



Name	Total Fees	Engagement Length	Credit Cards Balance	Total CC Amount	Investment Advisor
Brandon Patterson	150,738.59	3908	13,991.99	2	Ernest Knight
Russell Wagner	221,938.34	2212	13,749.83	1	Peter Castillo
Christopher Cooper	19,225.18	8343	12,970.00	1	Joe Carroll
Earl Hart	246,525.93	2780	12,841.82	2	Steve Sanchez
Robert Gibson	113,904.57	7679	12,607.68	1	Eugene Cunningham
Clarence Hart	86,383.52	6450	12,549.82	1	Sean Vasquez
Joseph Burns	187,319.68	8198	12,379.01	1	Jeremy Porter
Earl Wagner	103,938.76	7664	12,294.43	1	Sean Vasquez
Jose King	17,230.26	6610	12,102.46	1	Fred Bryant
Robert Harrison	30,291.71	1802	11,910.99	3	Ryan Taylor
George Cooper	13,666.32	1817	11,795.08	2	Victor Dean
Timothy Hunter	91,087.08	9663	11,789.66	1	Jeremy Porter
Lawrence Powell	98,951.80	1766	11,756.75	1	Peter Castillo
Daniel Thompson	127,764.89	7784	11,693.58	1	Jeremy Porter
Michael Bishop	5,106.32	7795	11,657.86	1	Sean Vasquez
Charles Powell	38,317.78	6656	11,609.85	2	Joe Carroll
Daniel Gomez	152,847.04	4149	11,596.13	1	Sean Vasquez
Justin Hart	139,685.30	2381	11,512.75	1	Peter Castillo
Martin Jordan	68,545.20	8883	11,375.95	1	Victor Gutierrez
Timothy Austin	38,657.54	6377	11,374.73	2	Victor Gutierrez
Charles Cole	86,059.25	6245	11,270.21	2	Kevin Kim
Total	158,192,196.39	16688993	9,528,620.83	4391	

Total Fees by Loyalty Classification



Total Fees and Engagement Length by Nationality

