

## Unsegmented Clients

Client Name	Future Potential	Referral	Sustainability of Assets	Relationship Quality	Assets Under Management	Annual Income Generated	Action
Jean Tremblay	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
					AUM: \$0	AIG: \$0	
Isabelle Côté	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
					AUM: \$0	AIG: \$0	
Pierre Turcotte	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
					AUM: \$0	AIG: \$0	

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## Segmented Clients

Date Last Updated: 08/05/2020

Client Name	Future Potential	Referral	Sustainability of Assets	Relationship Quality	Assets Under Management	Annual Income Generated	Score	Rank	Action
JEAN TREMBLAY	Medium	High	Medium	Excellent	\$135,628	\$5,343	47	Gold	
JEANNE TREMBLAY	High	Medium	Low	Excellent	\$150,000 <small>* External: \$150,000</small>	\$5,000 <small>* External: \$5,000</small>	41	Gold	
PIERRE TURCOTTE	Medium	Medium	Low	Poor	\$100,015 <small>* External: \$100,000</small>	\$3,000 <small>* External: \$3,000</small>	21	Silver	
LOUISE TURCOTTE	Low	Low	Low	Poor	\$51,762	\$462	6	Bronze	
ANDRÉ PAGÉ	Medium	Medium	High	Good	\$280,000 <small>* External: \$280,000</small>	\$5,000 <small>* External: \$5,000</small>	45	Gold	
▶ LOUIS OR LOUISE	Medium	High	High	Poor	\$120,000 <small>* External: \$120,000</small>	\$2,500 <small>* External: \$2,500</small>	34	Gold	
▶ LAFLEUR	High	High	High	Excellent	\$41,834	\$179	42	Gold	
ISABELLE CÔTÉ	Low	Low	Low	Poor	\$0	\$0	4	Bronze	
NICOLE MARCOTTE	High	Medium	High	Excellent	\$16	\$0	38	Gold	
JOHANNE MERCIER	Medium	Medium	High	Good	\$499,941 <small>* External: \$500,000</small>	\$1,000 <small>* External: \$1,000</small>	38	Gold	
DIANE MASSICOTTE	Medium	Low	High	Excellent	-\$293	\$0	29	Silver	
MARC LANDRY	Medium	Medium	Medium	Medium	-\$189	\$0	20	Silver	

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## Segmentation Summary

Category	Maximum	Minimum	Number of Clients	% of Clients
Platinum	65	62	0	
Gold	61	30	7	58
Silver	29	10	3	25
Bronze	9	-8	2	17

