



Fill	----- This means we are actively pushing Capita prospects to this advisor to help with book/salary/comp
Possible	----- Has capacity and would benefit from additional clients in this space
SSSK	----- Not actively seeking or filling this space
Exception Only	----- Typically a Self-Sourcing advisor or HNW advisor who is open to a few clients from other SRCs in this space (rare situations)
Pass	----- An advisor should bring on another advisor to SRV this HH when working through the prospect phase.

Code	NC	BA	AF	TS	AA	TA	JS	JK	KB	TG	ZG	RG	LH	JM	BW	RE	TW	TL
HHs	105	45	119	174	136	218	188	155	132	175	183	99	189	208	191	138	153	183
HHs To Add	120	125	106	51	89	32	62	50	93	30	22	61	0	0	0	12	27	0
Add/Keep per year	30-50+	30-50+	30-50+	9	15	5	10	8	16	5	4	10	0	0	0	2	5	0

	NC	BA	AF	TS	AA	TA	JS	JK	KB	TG	ZG	RG	LH	JM	BW	RE	TW	TL
300,000	Fill	Fill	300K	Pass	Pass	Pass	Pass	300K	300K	300K								
400,000	Fill	Fill	400K	Possible	Pass	Possible	Possible	400K	Pass	400K	400K	400K						
500,000	Fill	Fill	Fill	Fill	Possible	Possible	Possible	500K	Pass	500K	500K	500K						
600,000	Fill	Pass	Possible	600K	600K	600K												
700,000	Fill	Pass	Possible	Pass	Pass	700K	700K	700K	700K	700K	700K	700K						
800,000	Fill	800K	Possible	Pass	Pass	800K	800K	800K	800K	800K	800K	800K						
900,000	Possible	Fill	Fill	Possible	Possible	Fill	Fill	Fill	Possible	900K	900K	900K	Pass	Pass	900K	900K	900K	900K
1,000,000	1M	Fill	Possible	Possible	Possible	Fill	Fill	Fill	Fill	Possible	Possible	1M	Pass	Pass	1M	1M	1M	1M
1,250,000	1.25M	Fill	Possible	Possible	Possible	Possible	Possible	Fill	Possible	Possible	Possible	Pass	Possible	1.25M	1.25M	1.25M	1.25M	1.25M
1,500,000	1.5M	Fill	1.5M	1.5M	1.5M	Possible	Possible	Fill	1.5M	Possible	Possible	Pass	Possible	1.5M	Pass	Pass	Pass	1.5M
1,750,000	1.75M	Fill	1.75M	1.75M	1.75M	1.75M	1.75M	Fill	1.75M	Possible	Possible	1.75M	Possible	Possible	Pass	Pass	Pass	1.75M
2,000,000	2M	Fill	2M	2M	2M	2M	2M	Possible	2M	Fill	Fill	Fill	Possible	Possible	2M	Exception	Exception	Pass
3,000,000	3M	Possible	3M	Fill	Fill	Fill	Possible	Possible	Possible	Exception	Exception	Pass						
4,000,000	4M	Fill	Fill	Fill	4M	Possible	Possible	Exception	Exception	Exception								
5,000,000	5M	Fill	5M	5M	Possible	Exception	Exception	Exception										
7,500,000	7.5M	Fill	7.5M	7.5M	Possible	Exception	Exception	Exception										
10,000,000	10M	Possible	10M	10M	Possible	Exception	Exception	Exception										