



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	CS	AF	BA	TS	JS	TA	AA	NC	JK	KB	TG	ZG	RG	JM	LH	BW	RE	TW	TL
HHs	1	122	52	175	188	228	153	128	158	138	176	180	102	211	190	195	139	153	183
HHs To Add	224	103	118	50	62	22	72	97	47	87	29	25	58	0	0	0	11	27	0
Add/Keep per year	30-50+	30-50+	30-50+	8	10	4	12	16	8	15	5	4	10	0	0	0	2	5	0

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