

SPARDATA Valuation Activity Report

Report Date: 1/1/2009 to 12/31/2009

Contacts on File for [REDACTED] = 37

Valuation Status: Active

<u>Advisor</u>	<u>Client</u>	<u>Entity To Be Valued</u>	<u>Reason For BV</u>	<u>Contract Received Date</u>	<u>Source Campaign</u>
Howard [REDACTED]	Baron [REDACTED]	[REDACTED] Management [REDACTED]	Retirement and Estate Planning	8/24/2009	[REDACTED] Series [REDACTED] Coaching
1 Distinct Valuations are in Progress					

Valuation Status: Completed

<u>Advisor</u>	<u>Client</u>	<u>Entity To Be Valued</u>	<u>Reason For BV</u>	<u>Date Completed</u>	<u>Source Campaign</u>
Carrie [REDACTED]	Robert [REDACTED]	[REDACTED] Company	Retirement and Estate Planning	8/27/2009	[REDACTED] Annual Meeting May 2008
1 Distinct Valuations have been Completed					

Opportunity Status: Open

<u>Advisor</u>	<u>Client</u>	<u>Opportunity Name</u>	<u>Reason For BV</u>	<u>Estimated Closed Date</u>	<u>Sales Stage</u>	<u>Source Campaign</u>
Howard [REDACTED]		[REDACTED] Medical Group Inc.	Shareholder or Partnership Agreement (such as a buy-sell agreement)	9/30/2009	Consultation	[REDACTED] Annual Meeting [REDACTED]
Robert [REDACTED]	David [REDACTED]	[REDACTED] Bob [REDACTED]	Shareholder or Partnership Agreement (such as a buy-sell agreement)		Consultation	
2 Distinct Opportunities are Open and in the Consultation Stage						
Penny [REDACTED]		[REDACTED] older			Pre-consultation	[REDACTED] Study Group [REDACTED]
Robert [REDACTED]		[REDACTED] Parts [REDACTED]			Pre-consultation	
2 Distinct Opportunities are Open and in the Pre-consultation Stage						
4 Distinct Opportunities are in Progress						

Opportunity Status: Lost

<u>Advisor</u>	<u>Client</u>	<u>Opportunity Name</u>	<u>Reason For BV</u>	<u>Actual Closed Date</u>	<u>Sales Stage</u>	<u>Reason Lost</u>
Martin [REDACTED]		[REDACTED] Lumber Mill	Retirement and Estate Planning	4/14/2009	Consultation	Decided Not to Get BV at this Time
Robert [REDACTED]	David [REDACTED] Sr.	[REDACTED] Mechanical Contractors Inc.	Retirement and Estate Planning	4/21/2009	Consultation	Used Local BV Firm
2 Distinct Opportunities were Lost in the Consultation Stage						
Jason [REDACTED]		[REDACTED] Engineering Firm	Estate or Gift Tax Filing (IRS Form 706 or 709)	8/27/2009	Pre-consultation	Decided Not to Get BV at this Time
Jason [REDACTED]		[REDACTED] Business sale to key employee	Buying, Selling or Merging the Business	5/18/2009	Pre-consultation	Decided Not to Get BV at this Time
Michael [REDACTED]		[REDACTED] Packing		3/23/2009	Pre-consultation	Used Local BV Firm
Stanley [REDACTED]		Stan [REDACTED] appraisal firm		2/19/2009	Pre-consultation	Decided Not to Get BV at this Time
Howard [REDACTED]		Howard [REDACTED]		2/18/2009	Pre-consultation	Decided Not to Get BV at this Time
Howard [REDACTED]		[REDACTED] dentist - lease expires in 4 years		2/25/2009	Pre-consultation	Decided Not to Get BV at this Time
Maria [REDACTED]		Maria [REDACTED]		7/2/2009	Pre-consultation	Decided Not to Get BV at this Time
Maria [REDACTED]		[REDACTED] Mfg		4/9/2009	Pre-consultation	Decided Not to Get BV at this Time
Maria [REDACTED]		[REDACTED] Architect - [REDACTED]		2/2/2009	Pre-consultation	Decided Not to Get BV at this Time
Joseph [REDACTED]		[REDACTED] broker operating companies		7/21/2009	Pre-consultation	Decided Not to Get BV at this Time
Mary [REDACTED]		[REDACTED] Tractor	Retirement and Estate Planning	3/2/2009	Pre-consultation	Decided Not to Get BV at this Time
Alison [REDACTED]		[REDACTED] Supply Co for Pre-nup		4/23/2009	Pre-consultation	Decided Not to Get BV at this Time
12 Distinct Opportunities were Lost in the Pre-consultation Stage						
14 Distinct Opportunities were Lost						