

# HOT ISSUE REVIEW

A to Z Capital Management  
Phone: 555-555-1236

As of Date: 12/31/08

Client	Account #	Account Description	Date Acquired	Quantity	Total Tax Cost	Market Value
<b>Security: WestCorp (WCOR)</b>						
Going public in May, intense interest						
Alpha, Dr. Beta	1234567A	LAN030	06/11/07	250.000	6,125.98	4,480.00
						<b>Subtotal</b> 4,480.00
	1234567B	LAN020	06/11/07	210.000	5,145.38	3,763.20
						<b>Subtotal</b> 3,763.20
	1234567C	LAN010	10/18/06	1,000.000	26,363.50	17,920.00
						<b>Subtotal</b> 17,920.00
Apple Financial Trust	2345678A	AUT-010	08/02/07	125.000	2,943.50	2,240.00
			06/10/08	210.000	4,865.62	3,763.20
						<b>Subtotal</b> 6,003.20
Clem, Jack	2345678D		12/18/08	440.000	8,061.29	7,884.80
						<b>Subtotal</b> 7,884.80
Ryan, Nancy	2345678F	ROS010	08/13/07	150.000	3,488.35	2,688.00
						<b>Subtotal</b> 2,688.00
Shehade, Maisa	2345678G	SHE010	12/10/07	1,000.000	24,531.10	17,920.00
						<b>Subtotal</b> 17,920.00
Snopes, Michael	3456789A			651.000	9,400.44	11,665.92
						<b>Subtotal</b> 11,665.92
Truman, Darrin	456789*A	TRA010	08/16/07	875.000	20,287.63	15,680.00
						<b>Subtotal</b> 15,680.00
United Inc. 401(k) Profit St	456789*B	UNI020	06/11/07	200.000	4,946.00	3,584.00
			06/11/07	50.000	1,240.00	896.00
						<b>Subtotal</b> 4,480.00

