

WRITTEN AGREEMENTS REVIEW

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

Client	Signed Fee Agreement	Last Holdings Review	Last ADV Offering	Signed Policy Statement	Last Policy Review
Alpha, Dr. Beta	09/30/06	12/31/08	01/15/09	09/30/06	09/30/08
Apple Financial Trust	10/17/06	12/31/08	01/07/09	10/17/06	06/16/08
Bostwick, Randy	11/30/07	12/31/08	01/12/09	11/30/07	06/16/08
Carter, Mark and Amy	03/31/08	12/31/08	01/09/09	03/31/08	09/30/08
Clem, Jack	11/30/08	12/31/08	01/09/09	11/30/08	12/31/08
D'Amato, Lawrence	11/15/07	12/31/08	01/06/09	11/15/07	11/30/08
Ryan, Nancy	04/04/08	11/30/08	01/01/09	04/03/09	12/31/08
Shehade, Maisa	12/03/07	11/30/08	01/09/09	12/03/07	
Silver, Brody	09/29/08	12/31/08	01/14/09	09/29/08	
Snopes, Michael	10/01/08	11/30/08	01/08/09	10/01/08	
Truman, Darrin	08/02/07	11/30/08	01/15/09	08/02/07	07/31/08
United Inc. 401 k P.S.P.	05/31/07	11/30/08	01/13/09	05/31/07	03/31/08