

## StockOpter® Insight Monitoring Report

This report provides the monitoring status of your client's equity compensation portfolio. The following pages show the monitoring criteria and list of alerts for each client chosen in this run. The listing for each client starts on a new page.

The top of the page shows the monitoring criteria set for the client. A table showing one row for each alert that has been triggered follows the monitoring criteria. If no alerts have been triggered for a client, this listing will be empty except for the column headers. The columns of this table are described below. Additional information for these parameters can be found in the User's Guide, the Help File and the Personal Option Profile Report.

Grant ID	Grant Identifier
Option Type	Type of option grant (ISO = Incentive stock option; NQSO = Non-qualified stock option)
Expiration Date	Expiration grant of date
Strike Price	Strike price (or exercise price) for each option
Number	Total number of options in this grant
Alert	Which alert was triggered
Alert Value	Value of the relevant parameter for this trigger which caused this alert
ITM	In the money value for this lot
Net Cashout	Net cash-out value of this lot
Time Value	Time value of this lot
BSV	Black-Scholes value of this lot (TV/BSV alert values below 20% may indicate the need to diversify)
VaR	Value at Risk for this lot (TV/VaR alert values below 100% may indicate the need to diversify)

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Client Information	
Client Name	Sally Sample
"Financial Freedom" number	\$2,000,000
Current value of diversified portfolio	\$500,000

Rate Estimates	
Total Fed. / State income tax rate	35.0%
Total Fed. / State cap gains rate	15.0%
'Risk-free' rate of return	4.30%

Company stock holdings	
Number of owned shares	20,000
Cost basis of owned shares	\$300,000
Number of restricted shares	5,000
Cum purch. price of restricted shares	\$0

Alert me if, when the report is run, the ...		Lower limit	Upper limit	Enabled?
Company stock price is	outside	\$20.00	\$30.00	TRUE
Percent of Freedom Fund already secured is	> =	50.00		TRUE
Insight Ratio™	< =		20.00	TRUE
VaR Ratio	< =		50.00	TRUE
Any options will vest	in the next	180	days	TRUE
Any grant will expire	in the next	365	days	TRUE

Issuing corporation	
Ticker symbol	NASDAQ
Current price	\$24.00
Per share dividend	\$0.00
Estimated Volatility	40.00%

Grant ID	Option Type	Expiration Date	Strike Price	Number	Alert	Alert Value	ITM	Net Cashout	Time Value	BSV	VaR
					FF %	61.20%					
1ISO98	ISO	03/01/2008	\$17.55	25,000	TV/VaR	34.56%	161,250	104,813	36,775	198,025	106,399
1ISO98	ISO	03/01/2008	\$17.55	25,000	TV/BSV	18.57%	161,250	104,813	36,775	198,025	106,399
1ISO98	ISO	03/01/2008	\$17.55	25,000	Expiration	3/1/2008	161,250	104,813	36,775	198,025	106,399