



Dear Advisor,

Thank you for the opportunity to provide you with **StockOpter[®] Equity Compensation Solutions**. We are pleased to confirm our understanding of the scope of our services. By signing this letter you represent yourself as a financial planning professional qualified and licensed to advise your clients on the disposition of company stock and options.

The scope of this engagement is to create a **StockOpter[®] Personal Equity Compensation Profile (PECP)** report for your client and to review it in detail with you. This report analyzes the current value, leverage and risk in a client's company stock and option portfolio. It is your obligation and responsibility to provide us with the following information required to create this analysis and to review it for accuracy:

1. The client's current option grant summary report with vesting schedule
2. A completed PECP Data Checklist

From this data we will prepare a Personal Equity Compensation Profile report for your client and review it with you to explain the concepts (maximum 20 minutes). We will expect you to have thoroughly read the report prior to our review session so we can answer address any specific questions.

The StockOpter[®] PECP report is for education purposes only. Nothing contained in it should be construed as investment recommendations or advice. The financial calculations provided therein are to help the client understand the value, risk and leverage of their company stock and option portfolio and to identify their criteria for taking action. The mechanics of an option portfolio are constantly changing so periodic updates of the PECP are recommended. The values and risks illustrated in this report in no way represents a guarantee that the portfolio will produce a particular result.

You agree to indemnify and hold harmless Net Worth Strategies, Inc. and its directors, officers, employees and agents to the fullest extent lawful, against any and all losses, judgments, awards, claims, damages or liabilities ("claims"), together with all costs related hereto (including reasonable attorney fees), arising out of this engagement including, without limitation, claims arising as a result of any information that you provide to Net Worth Strategies, Inc. either in written or oral form relating to your client, except for any claim resulting primarily from the willful misconduct or gross negligence of Net Worth Strategies.

The cost of this service for a single client is \$250 (multiple client reports will be priced separately) and payment is required prior to creating the your PECP or conducting the review session. If you would like to pay via credit card, include your information below. Any additional analysis will be billed separately.



2762 NW Crossing Ave Ste 200

Bend, OR 97701

Voice: (541) 383-3899

Fax: (541) 388-0308

www.NetWorthStrategies.com

We appreciate the opportunity to assist you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions please let us know. If you agree with the terms of our engagement as stated above, please sign this letter and return it to us by fax so we can proceed.

Sincerely,

Bill Dillhoefer
Net Worth Strategies, Inc.
bdillhoefer@networthstrategies.com
www.networthstrategies.com
Tel: 541-383-3899
Fax: 541-388-0308

RESPONSE:

This letter correctly sets forth the understanding of:

Name: _____

Signature: _____

Date: _____ Phone: _____

Company / Ticker: _____

Client Name(s): _____

Credit Card Type and Number: _____

Expiration Date: _____

Name on Card: _____