Review Criteria
Investment Advisor - 2009

I. ADMINISTRATION & CLIENT SERVICES

1. How many clients have you gained/lost in each of the past five years?

Gained	2005	2006	2007	2008	2009
Public					
ERISA					
Taft--Hartley					
Endowment					
Foundation					
Religious Order					
Other					

Lost	2005	2006	2007	2008	2009
Public					
ERISA					
Taft--Hartley					
Endowment					
Foundation					
Religious Order					
Other					

Please provide the reason behind the termination.

2. What are your plans for growth in the next three years, and in the next five years?

3. What features set you apart from other advisors?

4. Describe any litigation or investigation within the last five years that has had or does now have a direct impact.

II. ADMINISTRATION & CLIENT SERVICES

1. Do you assign a primary relationship manager? If so, how may clients does this individual person or team have?

2. Please describe any organizational changes in the planning stage or that have already occurred within the past year.

3. How does your firm stay informed of current legislative and regulatory changes.

4. What type of training exists for your employees?
    a. How are employees kept up to date on current trends within the business?
    b. Are employees cross-trained to ensure proper workflow?

5. How many times a year do you meet with clients?

6. What are your retention policies and procedures for all records, tax materials, memos, correspondence and history?

AWARD CRITERIA
INVESTMENT ADVISOR

7. WHAT TYPES OF REPORTS ARE PROVIDED TO CLIENTS?

III. FEES

1. PLEASE SUBMIT A COPY OF THE CURRENT FEE SCHEDULE. ON WHAT BASIS IS THE FEE CALCULATED (I.E. ASSET BASED)?
2. HOW OFTEN ARE CLIENTS BILLED FOR SERVICES?
3. PLEASE STATE THE FEES FOR ON-LINE SERVICES.
4. PLEASE STATE ANY OTHER FEES NOT DIRECTLY ASKED IN THIS SECTION WHICH MAY BE APPLICABLE TO INSTITUTIONAL CLIENTS.

IV. METHODOLOGY

1. WHAT ARE YOUR FIRM'S STYLE PARAMETERS BASED ON PORTFOLIO, INCLUDING ASSET CLASS AND SPECIALTY FOCUS AS APPROPRIATE?
2. WHAT BENCHMARKS ARE USED?
3. WHAT IS THE FIRM SPECIFIC INVESTMENT PHILOSOPHY?
4. WHAT PORTFOLIO MANAGEMENT STRATEGY IS USED?
5. WHAT SYSTEM OF RISK MANAGEMENT SAFEGUARDS IS USED?