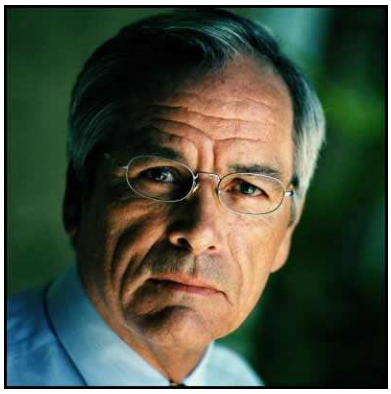

Brian Donnelly

Age 53 years
New York City
Senior Investment Analyst, Wachovia

Brian Donnelly is a Senior Investment Analyst for Wachovia with 19 years of experience. For the past 6 years he has focused on the financial sector and is considered to be an expert in his field. Brian has an MBA from Columbia University, has been married for 24 years, and has three children ages 22, 18, and 15 years. He is often described as a very focused individual with clear goals and a low tolerance for inefficiency. He sets high standards for himself and those he supervises. Brian also serves as guest lecturer in the MBA programs at both Columbia and the Leonard N. Stern School of Business at New York University.

Essential Content

- Fact sheet on the Company
- Archived financial data for three years
- Annual Report
- Interim, Preliminary, and Quarterly Statements
- Company's current share price and market cap
- Historical data on share price, dividend payments, and capital (including stock splits)
- Shareholding analysis by size and constituent
- Details of the percentage holding of principal shareholders
- Section 16(a) of the Securities Exchange Act of 1934, Form 4 filings for all Directors and Executive Committee members of the Company
- List of analysts covering the Company's stock
- Details of the stock exchanges on which the Company is listed
- Presentations and Webcasts
- Recent news

Essential Functionality

- Direct access to recent reports
- Search and sort
- Downloadable content for offline use
- Graphic displays of share price and history
- Access to electronic filings
- Calendar of important events including dividend, record, and payment dates
- Contact information and email links for the Investor Relations Department
- Newsletter / Alert subscription for notification of report and press releases via email

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New York City
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Frequency of Visits

- He visits the site regularly though not frequently; his visits are driven primarily by the release dates of reports, but he may also visit the site if there is a recent media event that catches his attention.
- In the future he will continue to be driven to the site based on the report release schedule, although improved access to content and an expanded content selection may encourage him to spend additional time on the site.
- He is likely to take advantage of an email subscription service that alerts him to the release of reports and statements.

Entry Point	Brian has bookmarked the Investor Relations overview and Financial reports pages and typically goes directly to them. However, when accessing the site from outside his office, he often goes first to the main retail site before arriving at the corporate information home page.
Visited Pages	He spends nearly all of his time in the Investor Relations section reviewing and retrieving recent reports, looking up current and historical share information, and looking up key ratios and financials. Occasionally, he needs more detailed information on shareholding analysis, SEC filings, and the Company's executives and board.
Exit Point	He most often exits from the Investor Relations section after retrieving the information he seeks. He does not browse through the site perusing the available information, and when he needs more detailed information he prefers to download and or print it for later reference.
Total Time on Site	Brian is very focused and spends, on average, only 3-5 minutes on the site; this is just long enough to retrieve the most recent information and download or print it for later use. He has visited the site enough times to be familiar with the structure and organization, however, he must occasionally look through the site to find what he needs, particularly when he does not access the site through his saved bookmarks and must locate information via the navigation system from the home page.