



# Cellar Management Solutions



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## I. CLIENT PROFILE

### **Palate Preference:**

Big, hedonistic red wines. Interested in exploring Cabernet Sauvignon from California, Chile and Argentina as well as Tempranillo-based wines from Spain. Prefers Burgundy-styled white wines, not oaky or buttery. Would like to experiment with California Chardonnay and Alsatian and German Riesling.

### **Consumption Pattern:**

Opens on average, 18 bottles per month for both entertainment and individual consumption.

### **Cellar Profile:**

Enthusiast collection of 600+ bottles, dominated by reds equaling 87% of the collection; of which Bordeaux comprises more than 40% of the collection, followed by 19% from Piemonte and another 15% out of Toscana (Brunello and Super Tuscans).

With an average bottle price of \$135, more than 59% of the collection includes wines in the **\$90.00 or more price category** with an overlapping 67% of the wines falling into the **medium drinkability profile** (which show best between 2005 – 2020).



## II. CELLAR AT A GLANCE

- 88% of collection is red, with the remainder equaling 5% white, 4% sparkling, and 3% dessert (see Page 10).
- France & Italy make up 90% of collection (see Page 11).
  - Bordeaux represents 41% of the cellar distribution based on the number of bottles but 60% based on portfolio \$ value (see Page 12).
  - Piedmont represents 19% of the cellar distribution based on the number of bottles but 17% based on portfolio \$ value (see Page 12).
  - Tuscany represents 15% of the cellar distribution based on the number of bottles but 7% based on portfolio \$ value (see Page 12).
  - New World wines represent only 8% of the cellar distribution based on the number of bottles but 7% based on portfolio \$ value (see Page 12).
- 67% of the collection is made up of “medium-term” (2005-2020) wines from 77 different labels totaling 369 bottles, while only 11% are “long-term” (2010-2040) (see Page 15).
- Of this 11%, 100% are French and Italian, 60% of which are from Piemonte (see Page 15).
- 60% of the cellar is made up of “special occasion” or “rare” bottles costing \$90.00 or more, while only 15% “everyday” wines - of which, approximately half are approachable Brunello and assorted white wines (see Page 17).



### **III. CELLAR OBJECTIVES**

#### **Primary**

Develop 600 bottle collection to 2,000 factoring annual depletion at 208, while balancing overall portfolio through the purchase of more “everyday wines” (less than \$49.00) and “short-term” (Drink now-2010) with “long-term” wines from California, Spain and South America.

#### **Secondary**

Strengthen “long-term” catalog with an emphasis on collector staples and targeted vintage futures.

### **IV. BUYING STRATEGY**

#### **Tier One**

Acquire new release cellar staples (Vega Sicilia, Chateau Montelena) along with Barolo 2001 futures for long-term cellaring. Accumulate monthly assorted “exploratory” cases that match palate profile and include indigenous regional varietals such as Grenache, Tempranillo, Monastrell, Aglianico, Negroamaro and Primitivo.

#### **Tier Two**

Recommended bottles driven by bottle price and allocated across drinkability gaps by focusing on New World reds from Napa Valley, Washington State, Chile, Argentina as well as expanding on hedonistic reds through Priorat/Montsant, Ribera del Duero, Rhone Valley, and new releases from Italy’s South.

Include purchase of value whites from Spain such as Albarino and Verdejo and sparkling wines (Prosecco, Sekt, and Cava) for entertaining.

DISTRIBUTION BY TYPE					
Type (750ml)	# Labels	Qty (b)	% of Total btl	Total	Avg Bottle Price
Red	98	480	87%	\$66,873	\$139
White	14	30	5%	\$1,413	\$47
Sparkling	8	23	4%	\$3,615	\$157
Dessert	10	16	3%	\$2,560	\$160
<b>Total</b>	<b>130</b>	<b>549</b>	<b>100%</b>	<b>\$74,461</b>	<b>\$136</b>

DISTRIBUTION BY COUNTRY					
Country (750ml)	# Labels	Qty (b)	% of Total btl	Total	Avg Bottle Price
<b>OLD WORLD</b>					
France	63	276	55%	\$48,101	\$174
Italy	55	215	43%	\$20,100	\$93
Spain	1	12	2%	\$624	\$52
Portugal	1	1	0%	\$100	\$100
	<b>120</b>	<b>504</b>	<b>100%</b>	<b>\$68,925</b>	<b>\$137</b>
<b>NEW WORLD</b>					
California	8	38	84%	\$2,961	\$78
Australia	1	6	13%	\$2,550	\$425
South Africa	1	1	2%	\$25	\$25
	<b>10</b>	<b>45</b>	<b>100%</b>	<b>\$5,536</b>	<b>\$123</b>
<b>TOTAL</b>	<b>130</b>	<b>549</b>	<b>100%</b>	<b>\$74,461</b>	<b>\$136</b>

DISTRIBUTION BY REGION					
Region (750ml)	# Labels	# btl	% of Total btl	\$	% of Total \$
Bordeaux (St. Estephe)	1	12	2%	\$1,680	2%
Bordeaux (Pauillac)	11	66	12%	\$14,870	20%
Bordeaux (St. Julien)	8	72	13%	\$12,438	17%
Bordeaux (Margaux)	2	13	2%	\$2,725	4%
Bordeaux (Graves)	5	18	3%	\$2,340	3%
Bordeaux (Medoc)	3	6	1%	\$160	0%
Bordeaux (Pomerol)	2	12	2%	\$3,540	5%
Bordeaux (St. Emilion)	5	28	5%	\$3,520	5%
Sauternes/Barsac	6	11	2%	\$2,315	3%
Burgundy (Red)	3	5	1%	\$300	0%
Burgundy (White)	5	5	1%	\$378	1%
Rhone Valley	3	3	1%	\$100	0%
Champagne	8	23	4%	\$3,615	5%
Loire Valley	1	2	0%	\$120	0%
Piemonte (Barbaresco)	3	27	5%	\$3,168	4%
Piemonte (Barolo)	9	43	8%	\$6,642	9%
Piemonte (Other)	9	32	6%	\$2,980	4%
Tuscany (Brunello di Montalcino)	14	53	10%	\$3,681	5%
Tuscany (Super Tuscan)	9	28	5%	\$1,669	2%
Veneto	1	3	1%	\$408	1%
Friuli	6	9	2%	\$406	1%
Emilia Romagna	2	9	2%	\$750	1%
Lombardy	2	11	2%	\$396	1%
Priorat	1	12	2%	\$624	1%
Portugal (Port)	1	1	0%	\$100	0%
Napa Valley	5	21	4%	\$2,181	3%
Sonoma Valley	1	12	2%	\$528	1%
Santa Barbera	2	5	1%	\$252	0%
Australia (Barossa Valley)	1	6	1%	\$2,550	3%
South Africa	1	1	0%	\$25	0%
<b>Total</b>	<b>130</b>	<b>549</b>	<b>100%</b>	<b>\$74,461</b>	<b>100%</b>

DISTRIBUTION BY DRINKABILITY					
Term (750ml)	# Labels	# btl	% of Total btl	\$	% of Total \$
Short-Term (Drinking 2005 - 2010)	41	122	22%	\$11,901	16%
Medium-Term (Drinking 2005 - 2020)	77	369	67%	\$56,015	75%
Long-Term (Drinking 2010 - 2040)	12	58	11%	\$6,544	9%
<b>Total</b>	<b>130</b>	<b>549</b>	<b>100%</b>	<b>\$74,461</b>	<b>100%</b>

DISTRIBUTION BY PRICE CATEGORY					
By Region (750ml)	# Labels	# btl	% of Total btl	\$	% of Total \$
Everyday (less than \$49.99)	33	90	16%	\$3,213	4%
Entertainment (\$50.00 - \$89.99)	46	136	25%	\$8,719	12%
Special Occasion (\$90.00 - \$149.99)	21	141	26%	\$17,069	23%
Rare (\$150.00 and more)	30	182	33%	\$45,460	61%
<b>Total</b>	<b>130</b>	<b>549</b>	<b>100%</b>	<b>\$74,461</b>	<b>100%</b>



**CELLAR DISTRIBUTION BY REGION**

Vint.	Type	Producer	Wine	Vineyard	Varietal	Country	Region	Sub Region or Classification	Size	Qty (b)	Price/b	Total	
<b>FRANCE</b>													
<b>Bordeaux (St. Estephe)</b>													
1989	red	Chateau Cos d'Estournel	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Estephe)	St. Estephe	750	12	\$140	\$1,680	
										<b>Total</b>	<b>12</b>		<b>\$1,680</b>
<b>Bordeaux (Pauillac)</b>													
1990	red	Chateau Mouton Rothschild	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	1	\$325	\$325	
1990	red	Chateau Lafite Rothschild	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	12	\$400	\$4,800	
1990	red	Chateau Pichon Baron	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	12	\$225	\$2,700	
1986	red	Chateau Pichon Lalande	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	6	\$200	\$1,200	
2000	red	Carruades de Lafite	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	2	\$60	\$120	
2001	red	Chateau Pichon Baron	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	1	\$50	\$50	
1974	red	Chateau Latour	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	1	\$75	\$75	
1972	red	Chateau Latour	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	2	\$75	\$150	
1985	red	Chateau Lafite Rothschild	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	12	\$325	\$3,900	
1974	red	Chateau Lafite Rothschild	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	6	\$75	\$450	
1982	red	Duhart Milon Rothschild	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Pauillac)	Pauillac	750	11	\$100	\$1,100	
										<b>Total</b>	<b>66</b>		<b>\$14,870</b>
<b>Bordeaux (St. Julien)</b>													
1989	red	Chateau Leoville Las Cases	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	12	\$300	\$3,600	
1985	red	Chateau Leoville Las Cases	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	12	\$200	\$2,400	
1978	red	Chateau Leoville Las Cases	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	10	\$140	\$1,400	
2001	red	Chateau Leoville Barton	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	1	\$48	\$48	
1996	red	Chateau Ducru Beaucaillou	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	12	\$135	\$1,620	
1998	red	Chateau Ducru Beaucaillou	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	1	\$70	\$70	
1986	red	Chateau Gruaud Larose	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	12	\$150	\$1,800	
1990	red	Chateau Ducru Beaucaillou	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (St. Julien)	St. Julien	750	12	\$125	\$1,500	
										<b>Total</b>	<b>72</b>		<b>\$12,438</b>
<b>Bordeaux (Margaux)</b>													
1989	red	Chateau Palmer	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Margaux)	Margaux	750	11	\$225	\$2,475	
2001	red	Chateau Palmer	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Margaux)	Margaux	750	2	\$125	\$250	
										<b>Total</b>	<b>13</b>		<b>\$2,725</b>
<b>Bordeaux (Graves)</b>													
1974	red	Chateau La Mission Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Graves)	Graves	750	1	\$200	\$200	
1996	red	Bahans Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Graves)	Graves	750	1	\$40	\$40	
1993	red	Chateau Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Graves)	Graves	750	12	\$150	\$1,800	
1977	red	Chateau Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Graves)	Graves	750	3	\$75	\$225	
1974	red	Chateau Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Graves)	Graves	750	1	\$75	\$75	
										<b>Total</b>	<b>18</b>		<b>\$2,340</b>
<b>Bordeaux (Medoc)</b>													
1999	red	Chateau Potensac	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Medoc)	Medoc	750	2	\$15	\$30	
1998	red	Chateau Potensac	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Medoc)	Medoc	750	2	\$25	\$50	
1996	red	Chateau Sociando-Mallet	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux (Medoc)	Haut-Medoc	750	2	\$40	\$80	
										<b>Total</b>	<b>6</b>		<b>\$160</b>
<b>Bordeaux (Pomerol)</b>													
1990	red	Chateau L'Evangile	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (Pomerol)	Pomerol	750	6	\$350	\$2,100	
1989	red	La Fleur de Gay	Red Bordeaux		Merlot	France	Bordeaux (Pomerol)	Pomerol	750	6	\$240	\$1,440	
										<b>Total</b>	<b>12</b>		<b>\$3,540</b>
<b>Bordeaux (St. Emilion)</b>													
1989	red	Chateau La Dominique	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (St. Emilion)	St. Emilion	750	12	\$85	\$1,020	
1982	red	Chateau Canon	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (St. Emilion)	St. Emilion	750	12	\$190	\$2,280	
1994	red	Chateau Troplong Mondot	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (St. Emilion)	St. Emilion	750	2	\$65	\$130	
1982	red	Domaine Gaffelière	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (St. Emilion)	St. Emilion	750	1	\$75	\$75	
1993	red	Puy Blanquet	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux (St. Emilion)	St. Emilion	750	1	\$15	\$15	
										<b>Total</b>	<b>28</b>		<b>\$3,520</b>


**CELLAR DISTRIBUTION BY REGION**

Vint.	Type	Producer	Wine	Vineyard	Varietal	Country	Region	Sub Region or Classification	Size	Qty (b)	Price/b	Total
<b>Sauternes/Barsac</b>												
1986	des	Chateau d'Arche	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	750	1	\$45	\$45
1986	des	Chateau Romer du Hayot	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	750	1	\$50	\$50
1990	des	Chateau Climens	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	750	3	\$130	\$390
1990	des	Chateau Rieussec	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	375	1	\$55	\$55
1988	des	Chateau d'Yquem	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	750	4	\$350	\$1,400
1989	des	Chateau d'Yquem	Sauternes		Sauvignon Blanc, Semillon	France	Sauternes	Graves	750	1	\$375	\$375
<b>Total</b>										<b>11</b>		<b>\$2,315</b>

<b>Burgundy (Red)</b>												
1992	red	Domaine Jacky Truchot	Morey St. Denis 1er Cru	Clos Sorbè	Pinot Noir	France	Burgundy (Red)	Côte de Nuits	750	1	\$50	\$50
1973	red	Domaine Prosper Maufoux	Le Musigny Grand Cru		Pinot Noir	France	Burgundy (Red)	Chambolle Musigny	750	1	\$55	\$55
1972	red	Domaine Prosper Maufoux	Richebourg Grand Cru		Pinot Noir	France	Burgundy (Red)	Vosne Romanée	750	3	\$65	\$195
<b>Total</b>										<b>5</b>		<b>\$300</b>

<b>Burgundy (White)</b>												
1995	wh	Domaine Matrot	Puligny Montrachet 1er Cru	Les Chalumeaux	Chardonnay	France	Burgundy (White)	Côte de Beaune	750	1	\$75	\$75
1995	wh	Domaine Louis Latour	Puligny Montrachet 1er Cru	Les Truffières	Chardonnay	France	Burgundy (White)	Côte de Beaune	750	1	\$80	\$80
2002	wh	Domaine Thevenot-Le Brun	Hautes Cotes de Nuits		Chardonnay	France	Burgundy (White)	Cotes de Nuits	750	1	\$18	\$18
1989	wh	Domaine Roger Caillot	Batard Montrachet Grand Cru		Chardonnay	France	Burgundy (White)	Côte de Beaune	750	1	\$150	\$150
1994	wh	Domaine Fontaine Gagnard	Chassagne Montrachet		Chardonnay	France	Burgundy (White)	Côte de Beaune	750	1	\$55	\$55
<b>Total</b>										<b>5</b>		<b>\$378</b>

<b>Rhone Valley</b>												
1982	red	Domaine Faurie	Hermitage		Syrah	France	Rhone Valley	Hermitage	750	1	\$50	\$50
2001	red	Domaine de la Solitude	Chateauneuf du Pape		Grenache	France	Rhone Valley	Chateauneuf du Pape	750	1	\$35	\$35
1995	des	Paul Jaboulet Ainee	Beaumes de Venise		Muscat	France	Rhone Valley	Valence	750	1	\$15	\$15
<b>Total</b>										<b>3</b>		<b>\$100</b>

<b>Champagne</b>												
1990	cha	Moet et Chandon	Dom Perignon		Chardonnay, Pinot Noir	France	Champagne		750	1	\$150	\$150
1988	cha	Moet et Chandon	Dom Perignon		Chardonnay, Pinot Noir	France	Champagne		750	6	\$175	\$1,050
1988	cha	Louis Roederer	Cristal		Pinot Noir	France	Champagne		750	2	\$300	\$600
1986	cha	Taittinger	Comtes de Champagne		Chardonnay	France	Champagne		750	1	\$175	\$175
NV	cha	Larmandier	Blanc de Blancs		Chardonnay	France	Champagne	Côtes des Blancs	750	6	\$40	\$240
1985	cha	Moet et Chandon	Dom Perignon		Chardonnay, Pinot Noir	France	Champagne		750	1	\$200	\$200
1988	cha	Perrier Jouet	Fleur de Champagne		Chardonnay	France	Champagne		750	4	\$150	\$600
1989	cha	Louis Roederer	Cristal		Pinot Noir	France	Champagne		750	2	\$300	\$600
<b>Total</b>										<b>23</b>		<b>\$3,615</b>

<b>Loire Valley</b>												
1989	des	Domaine Cauhape	Quintessence		Petit Manseng	France	Loire Valley	Jurançon	375	2	\$60	\$120
<b>Total</b>										<b>2</b>		<b>\$120</b>

**ITALY**

<b>Piemonte (Barbaresco)</b>												
1996	red	Gaja	Barbaresco		Nebbiolo	Italy	Piemonte (Barbaresco)	Barbaresco	750	12	\$125	\$1,500
1998	red	La Spinetta	Barbaresco	Standeri	Nebbiolo	Italy	Piemonte (Barbaresco)	Neive	750	0	\$79	\$0
1997	red	Gaja	Barbaresco		Nebbiolo	Italy	Piemonte (Barbaresco)	Barbaresco	750	12	\$119	\$1,428
1985	red	Bianco Luigi	Barbaresco	Rabaja	Nebbiolo	Italy	Piemonte (Barbaresco)		750	3	\$80	\$240
<b>Total</b>										<b>27</b>		<b>\$3,168</b>

<b>Piemonte (Barolo)</b>												
1996	red	Gaja	Barolo	Sperss	Nebbiolo	Italy	Piemonte (Barolo)	Serralunga	750	12	\$127	\$1,524
1996	red	Gaja	Barolo	Sperss	Nebbiolo	Italy	Piemonte (Barolo)	Serralunga	750	2	\$179	\$358
1990	red	Gaja	Barolo	Sperss	Nebbiolo	Italy	Piemonte (Barolo)	Serralunga	750	12	\$300	\$3,600
1997	red	Voerzio	Barolo	La Serra	Nebbiolo	Italy	Piemonte (Barolo)	La Morra	750	3	\$111	\$334
1997	red	Rocche dei Manzoni	Barolo	Big d' Big	Nebbiolo	Italy	Piemonte (Barolo)	Monforte d'Alba	750	3	\$55	\$165
1997	red	Rocche dei Manzoni	Barolo	Roul	Nebbiolo	Italy	Piemonte (Barolo)	Monforte d'Alba	750	2	\$55	\$110


**CELLAR DISTRIBUTION BY REGION**

Vint.	Type	Producer	Wine	Vineyard	Varietal	Country	Region	Sub Region or Classification	Size	Qty (b)	Price/b	Total
1997	red	Rocche dei Manzoni	Barolo	Santo Stefano	Nebbiolo	Italy	Piemonte (Barolo)	Monforte d'Alba	750	0	\$58	\$0
1997	red	Vigna dei Dardi	Barolo	Dardi	Nebbiolo	Italy	Piemonte (Barolo)		750	3	\$43	\$129
1996	red	Giacomo Conterno	Barolo	Cascina Francia	Nebbiolo	Italy	Piemonte (Barolo)	Monforte d'Alba	750	3	\$98	\$295
1996	red	Abbona	Barolo	Tyrol Ravera	Nebbiolo	Italy	Piemonte (Barolo)	Dogliani	750	3	\$42	\$127
									<b>Total</b>	<b>43</b>		<b>\$6,642</b>

**Piemonte (Other)**

1997	red	Cascina Ebreo	Torbido		Nebbiolo	Italy	Piemonte (Langhe)	Langhe	750	3	\$95	\$286
1998	red	Ca Viola	Bric du Luv		Barbera, Pinot Noir	Italy	Piemonte (Langhe)	Langhe	750	3	\$68	\$204
2000	red	Ceretto	Monsordo		Cabernet Sauvignon, Pinot Noir, M	Italy	Piemonte (Langhe)	Langhe	750	1	\$30	\$30
1996	des	Chiarlo	Nivole		Moscato	Italy	Piemonte (Moscato d'Alba)	Moscato d'Alba	375	1	\$10	\$10
1998	red	Clerico	Arte		Nebbiolo, Cabernet Sauvignon, Bar	Italy	Piemonte (Langhe)	Monforte d'Alba	750	3	\$38	\$113
1996	red	Abrigo	Merlot	Livraie	Merlot	Italy	Piemonte (Langhe)	Langhe	750	3	\$44	\$132
1998	red	Braida Giacomo Bologna	Bricco Uccellone		Barbera	Italy	Piemonte (Barbera)	Barbera d'Asti	750	4	\$39	\$156
1990	red	Braida Giacomo Bologna	Bricco Uccellone		Barbera	Italy	Piemonte (Barbera)	Barbera d'Asti	750	4	\$200	\$800
1971	red	Le Colline	Gattinara	Conte Ravizza	Nebbiolo	Italy	Piemonte (Gattinara)	Gattinara	750	10	\$125	\$1,250
									<b>Total</b>	<b>32</b>		<b>\$2,980</b>

**Tuscany (Brunello di Montalcino)**

1997	red	Poggio di Sotto	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	6	\$95	\$570
1997	red	Cerbaiona	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$140	\$420
1995	red	Biondi-Santi	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	2	\$93	\$186
1995	red	Soldera (Case Basse)	Brunello	Intistieti	Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	2	\$196	\$392
1996	red	Poggio Antico	Brunello	Altero	Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$62	\$185
1996	red	Poggio Antico	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$62	\$185
1995	red	Collemattoni	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$54	\$162
1997	red	La Rasina	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	6	\$39	\$234
1996	red	La Rasina	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$41	\$122
1997	red	Talenti	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	4	\$59	\$236
1995	red	Talenti	Brunello Riserva		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	0	\$69	\$0
1997	red	Poggio Salvi	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	6	\$45	\$270
1997	red	Lisini	Brunello		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	6	\$45	\$270
1995	red	Lisini	Brunello	Ugolaia	Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$78	\$235
1995	red	Poggio Antico	Brunello Riserva		Sangiovese	Italy	Tuscany (Brunello)	Montalcino	750	3	\$71	\$214
									<b>Total</b>	<b>53</b>		<b>\$3,681</b>

**Tuscany (Super Tuscan)**

1997	red	Felsina	Maestro Raro		Cabernet Sauvignon	Italy	Tuscany (Super Tuscan)	Castelnuovo Berardenga	750	3	\$63	\$190
1997	red	Grattamacco	Rosso		Sangiovese, Cabernet Sauvignon	Italy	Tuscany (Super Tuscan)	Bolgheri	750	4	\$63	\$252
1998	red	Costanti	Ardingo Calbello		Merlot, Cabernet Sauvignon	Italy	Tuscany (Super Tuscan)	Montalcino	750	3	\$50	\$149
1998	red	La Calonica	Merlot	Signorelli	Merlot	Italy	Tuscany (Super Tuscan)	Montepulciano	750	3	\$46	\$139
1997	red	Rodano	Monna Claudia		Sangiovese, Cabernet Sauvignon	Italy	Tuscany (Super Tuscan)	Castellina in Chianti	750	3	\$40	\$119
1996	red	Paradiso	Paterno II		Sangiovese	Italy	Tuscany (Super Tuscan)	San Gimignano	750	3	\$38	\$115
1997	red	Fattoria Manzano	Podere Il Bosco		Syrah	Italy	Tuscany (Super Tuscan)		750	3	\$80	\$240
1999	red	Tenuta di Trinoro	Palazzi		Bordeaux Blend	Italy	Tuscany (Super Tuscan)		750	3	\$96	\$289
1997	red	Le Macchiole	Paleo Rosso		Sangiovese, Cabernet Sauvignon, C	Italy	Tuscany (Super Tuscan)	Bolgheri	750	3	\$59	\$177
1997	red	Pancrazi	Pinot Nero		Pinot Noir	Italy	Tuscany (Super Tuscan)		750	0	\$47	\$0
									<b>Total</b>	<b>28</b>		<b>\$1,669</b>

**Veneto**

1995	red	Quintarelli	Amarone		Corvina	Italy	Veneto	Valpolicella	750	3	\$136	\$408
1997	red	Allegrini	Amarone		Corvina	Italy	Veneto	Valpolicella	750	0	\$82	\$0
									<b>Total</b>	<b>3</b>		<b>\$408</b>

**Friuli**

1995	red	Radikon	Merlot		Merlot	Italy	Friuli	Gorizio	750	1	\$78	\$78
1997	wh	Kante	Vitovska		Vitovska	Italy	Friuli	Carso	750	1	\$30	\$30
1997	wh	Kante	Malvasia		Malvasia	Italy	Friuli	Carso	750	1	\$30	\$30
1997	wh	Kante	Chardonnay		Chardonnay	Italy	Friuli	Carso	750	2	\$37	\$74
1997	wh	Kante	Sauvignon		Sauvignon	Italy	Friuli	Carso	750	2	\$37	\$74
1995	red	Kante	Terrano		Terrano	Italy	Friuli	Carso	750	2	\$60	\$120
									<b>Total</b>	<b>9</b>		<b>\$406</b>



**CELLAR DISTRIBUTION BY REGION**

Vint.	Type	Producer	Wine	Vineyard	Varietal	Country	Region	Sub Region or Classification	Size	Qty (b)	Price/b	Total
<b>Emilia Romagna</b>												
1997	red	La Palazza	Magnificat		Cabernet Sauvignon	Italy	Emilia Romagna		750	3	\$70	\$210
1985	red	Vallania			Cabernet Sauvignon	Italy	Emilia Romagna	Colli Bolognesi	750	6	\$90	\$540
									<b>Total</b>	<b>9</b>		<b>\$750</b>
<b>Lombardy</b>												
1987	red	Ca del Bosco	Pinero		Pinot Noir	Italy	Lombardy	Franciacorta	750	6	\$66	\$396
1974	red	Sfursat	Sfursat		Nebbiolo	Italy	Lombardy		750	5	\$0	\$0
									<b>Total</b>	<b>11</b>		<b>\$396</b>
<b>SPAIN</b>												
<b>Priorat</b>												
2001	red	Pasanau	Finca la Planeta		Grenache	Spain	Priorat		750	12	\$52	\$624
									<b>Total</b>	<b>12</b>		<b>\$624</b>
<b>PORTUGAL</b>												
<b>Portugal (Port)</b>												
1980	des	Taylor's	Vintage Port		Touriga Nacional, Tinta Roriz	Portugal	Oporto		750	1	\$100	\$100
									<b>Total</b>	<b>1</b>		<b>\$100</b>
<b>USA</b>												
<b>Napa Valley</b>												
2002	red	S.P. Drummer	Cabernet Sauvignon, Cabernet Franc	Blair Vineyard	Cabernet Sauvignon, Cabernet Franc	California	Napa Valley		750	12	\$57	\$684
2001	red	Atalon	Merlot		Merlot	California	Napa Valley		750	1	\$19	\$19
2001	wh	Robert Mondavi	Chardonnay		Chardonnay	California	Napa Valley	Carneros	750	1	\$22	\$22
2001	red	Kendall Jackson	Vintner's Reserve		Cabernet Sauvignon	California	Napa Valley		750	1	\$16	\$16
1991	red	Dominus	Cabernet Sauvignon		Cabernet Sauvignon	California	Napa Valley	Oakville	750	6	\$240	\$1,440
									<b>Total</b>	<b>21</b>		<b>\$2,181</b>
<b>Sonoma Valley</b>												
2002	wh	Chasseur	Chardonnay	Durrel	Chardonnay	California	Sonoma		750	12	\$44	\$528
									<b>Total</b>	<b>12</b>		<b>\$528</b>
<b>Santa Barbara</b>												
1999	wh	Brewer-Clifton	Chardonnay	Sweeney Canyon	Chardonnay	California	Santa Barbara	Santa Rita Hills	750	2	\$49	\$99
1999	wh	Brewer-Clifton	Chardonnay	Marcella	Chardonnay	California	Santa Barbara	Santa Rita Hills	750	3	\$51	\$153
									<b>Total</b>	<b>5</b>		<b>\$252</b>
<b>AUSTRALIA</b>												
<b>Australia (Barossa Valley)</b>												
1990	red	Penfolds	Grange		Shiraz	Australia	Australia (Barossa Valley)		750	6	\$425	\$2,550
									<b>Total</b>	<b>6</b>		<b>\$2,550</b>
<b>SOUTH AFRICA</b>												
<b>South Africa</b>												
2004	wh	Mulderbosch	Sauvignon Blanc		Sauvignon Blanc	South Africa	Stellenbosch		750	1	\$25	\$25
									<b>Total</b>	<b>1</b>		<b>\$25</b>
<b>TOTAL (750ML)</b>												
									<b>Total</b>	<b>549</b>		<b>\$74,461</b>



**CELLAR DISTRIBUTION BY REGION**

Vint.	Type	Producer	Wine	Vineyard	Varietal	Country	Region	Sub Region or Classification	Size	Qty (b)	Price/b	Total
<b>LARGE FORMAT</b>												
1982	red	Chateau Ausone	Red Bordeaux		Merlot, Cabernet Franc	France	Bordeaux	St. Emilion	M	2	\$1,000	\$2,000
1993	red	Chateau Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux	Graves	M	6	\$300	\$1,800
1990	red	Chateau Haut Brion	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux	Graves	M	6	\$650	\$3,900
1961	red	Chateau Haut Brion (label missing)	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux	Graves	M	2	\$4,000	\$8,000
1979	red	Chateau Leoville Las Cases	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux	St. Julien	6L	1	\$1,800	\$1,800
1989	red	Chateau Leoville Las Cases	Red Bordeaux		Cabernet Sauvignon, Merlot	France	Bordeaux	St. Julien	M	6	\$400	\$2,400
1973	red	Mastroberardino	Taurasi		Aglianico	Italy	Campania		DM	1	\$600	\$600
NV	cha	Larmandier	Blanc de Blancs		Chardonnay	France	Champagne	Côtes des Blancs	M	3	\$40	\$120
1987	red	Robert Mondavi	Cabernet Sauvignon Reserve		Cabernet Sauvignon	California	Napa	Oakville	DM	1	\$700	\$700
1979	red	Robert Mondavi	Cabernet Sauvignon		Cabernet Sauvignon	California	Napa	Oakville	M	1	\$200	\$200
1997	red	Ceretto	Barolo	Prapo	Nebbiolo	Italy	Piemonte	Alba	M	1	\$134	\$134
1982	red	Gaja	Barbaresco	Sori Tildin	Nebbiolo	Italy	Piemonte	Barbaresco	DM	1	\$1,500	\$1,500
1979	red	Gaja	Barbaresco		Nebbiolo	Italy	Piemonte	Barbaresco	DM	1	\$1,100	\$1,100
1993	red	Braida Giacomo Bologna	Bricco Uccellone		Barbera	Italy	Piemonte		M	12	\$125	\$1,500
1985	red	Braida Giacomo Bologna	Bricco Uccellone		Barbera	Italy	Piemonte		M	1	\$195	\$195
1979	red	Antinori	Tignanello		Sangiovese, Cabernet Sauvignon	Italy	Tuscany	Chianti Classico	5L	1	\$800	\$800
1969	red	Antinori	Chianti Classico		Sangiovese	Italy	Tuscany	Chianti Classico	M	1	\$250	\$250

**Total 47 \$26,999**

**GRAND TOTAL (ALL FORMATS)**

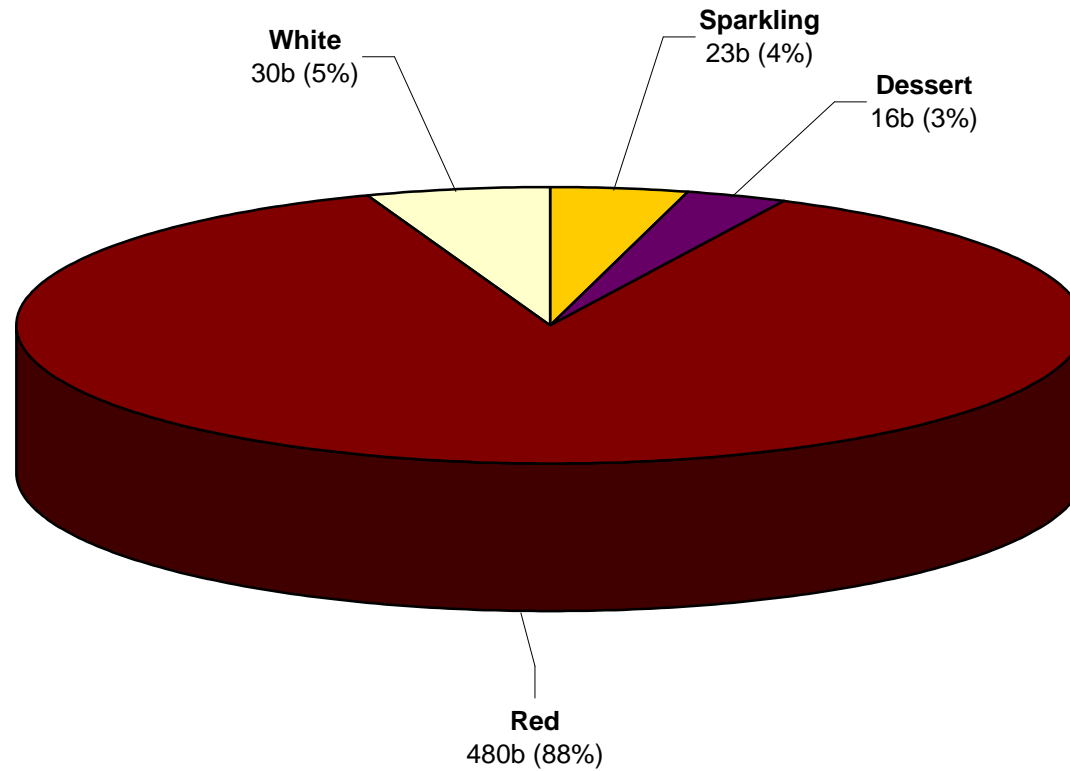
**Total 596 \$101,459**

**BREAKDOWN BY COUNTRY (750ml)**

Country	Qty (b)	Total
<b>OLD WORLD</b>		
France	276	\$ 48,101.00
Italy	215	\$ 20,099.74
Spain	12	\$ 624.00
Portugal	1	\$ 100.00
	<b>504</b>	<b>\$ 68,924.74</b>
<b>NEW WORLD</b>		
California	38	\$ 2,961.05
Australia	6	\$ 2,550.00
South Africa	1	\$ 25.00
	<b>45</b>	<b>\$ 5,536.05</b>
<b>TOTAL</b>	<b>549</b>	<b>\$ 74,460.79</b>



### Cellar Distribution By Wine Type

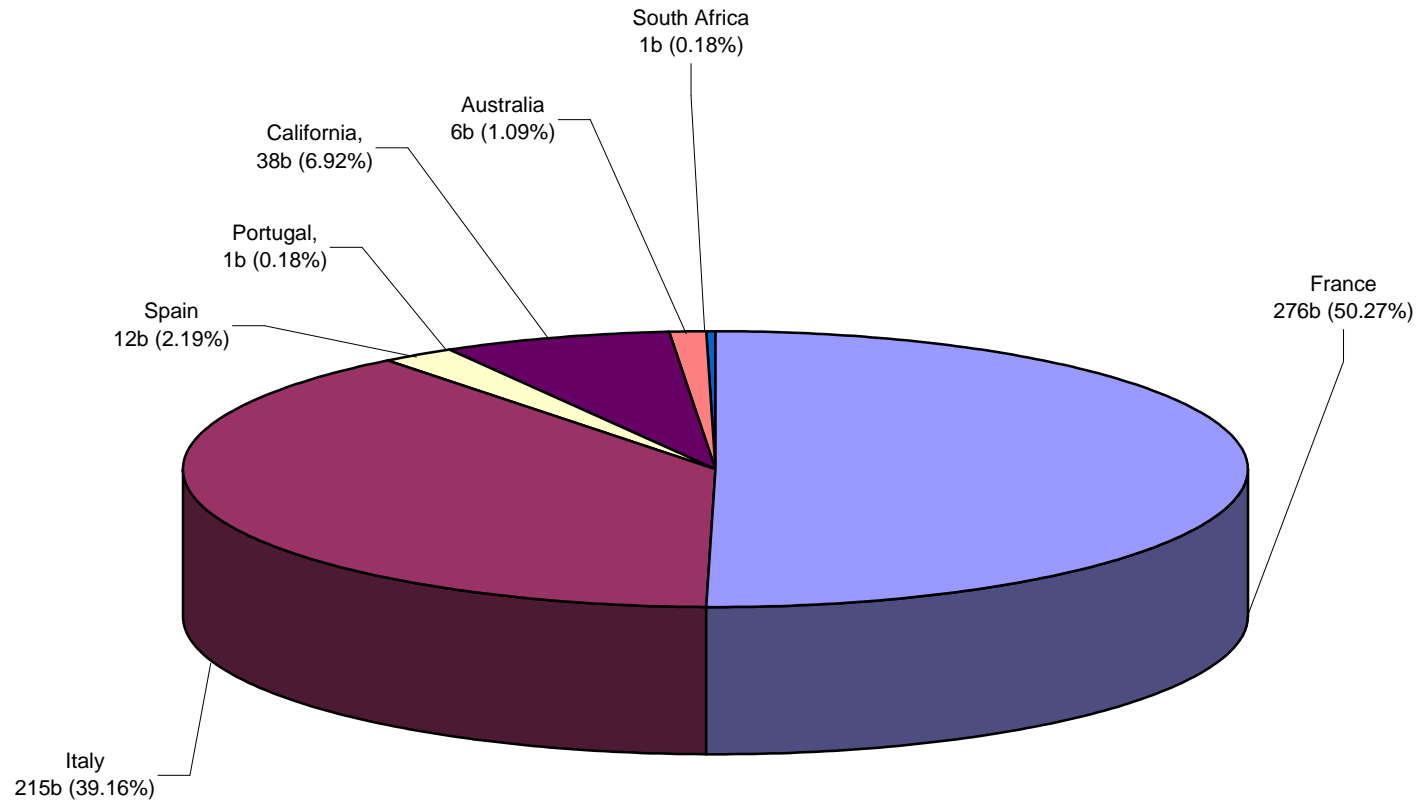


**Analysis:**  
88% of collection is red, consistent with client preference.

**Recommendation:**  
Round out white wines to reflect client's taste for white Burgundy. Add value sparkling wine such as Cava and Sekt for entertaining.



## Cellar Distribution By Country



**Analysis:**

France & Italy make up 90% of collection. New World represents less than 8%.

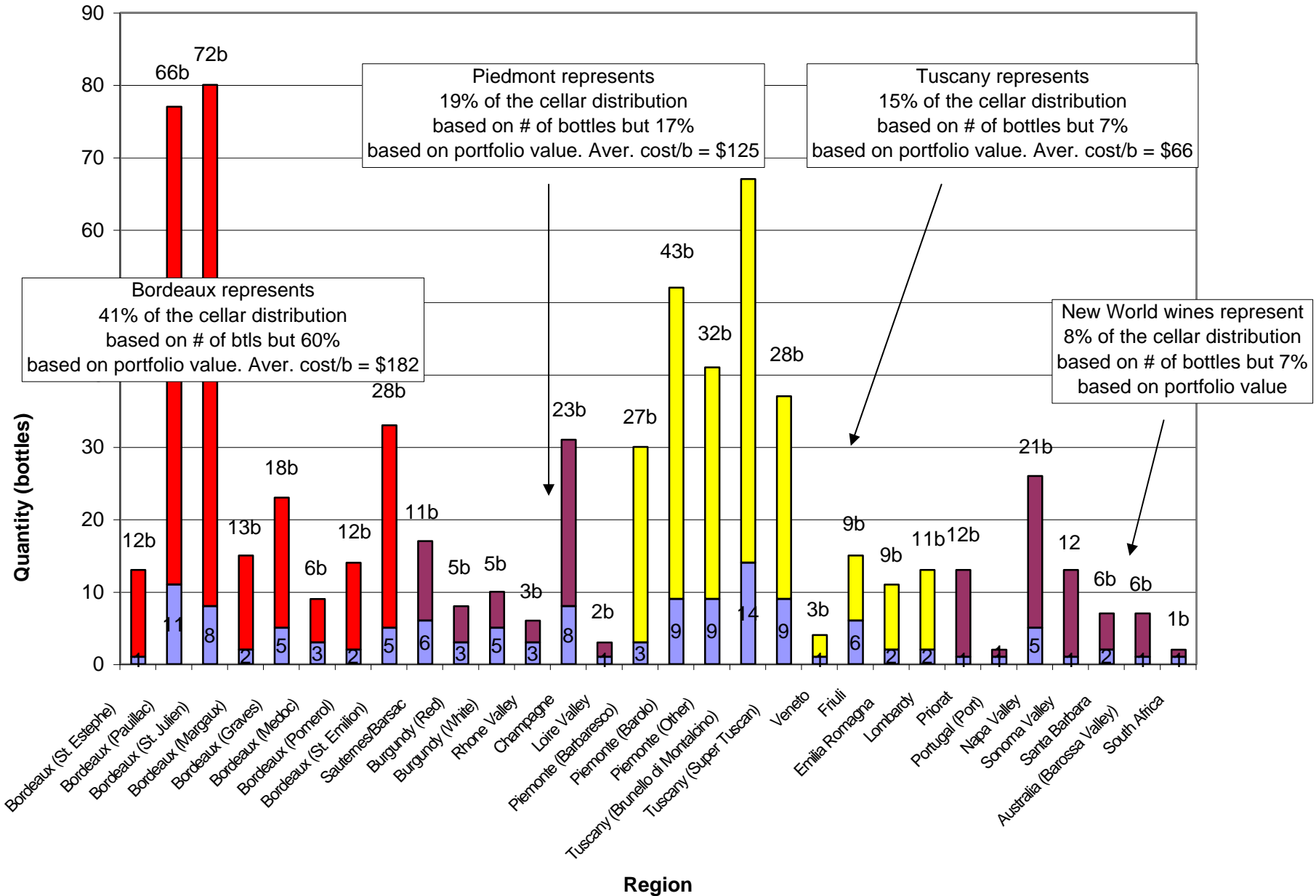
**Recommendation:**

Focus on adding hedonistic reds from California, Chile, Spain, Argentina and Italy.



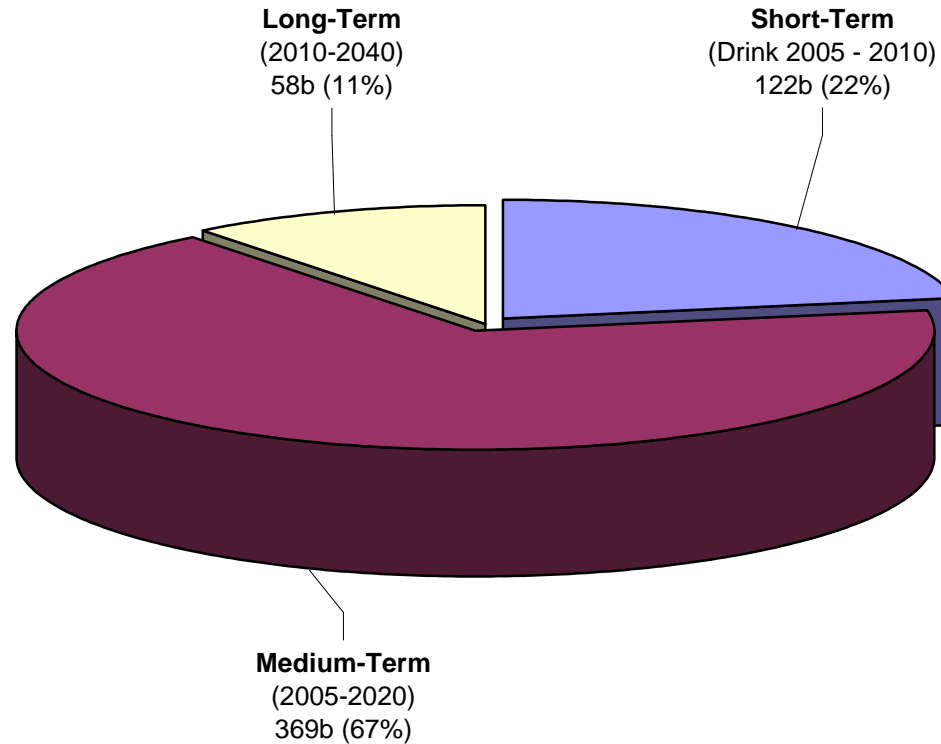
### Cellar Distribution By Region

# btl's  
# Labels





## Cellar Distribution By Drinkability



### Analysis:

67% of bottles are "medium-term" drinking - 77 labels and 369 bottles; only 11% are long-term.

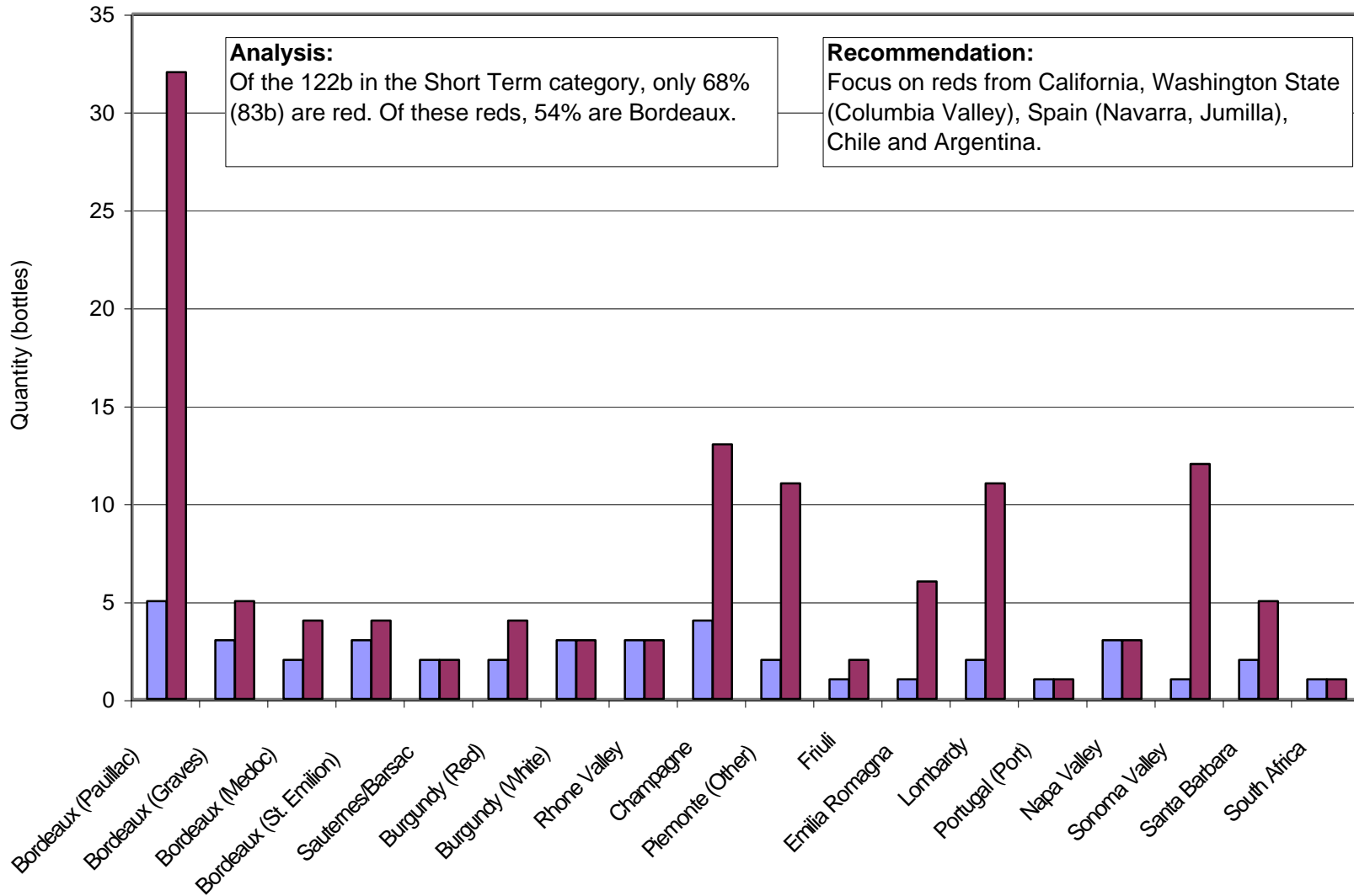
### Recommendation:

Focus on "short-term" with blends from California, Washington State and Chile and for "long-term" reds, California Cabernet Sauvignon (100% and select high-end Chilean Cabernet Sauvignon).



### Cellar Distribution by "Short-Term" (Drink 2005 - 2010) Drinkability

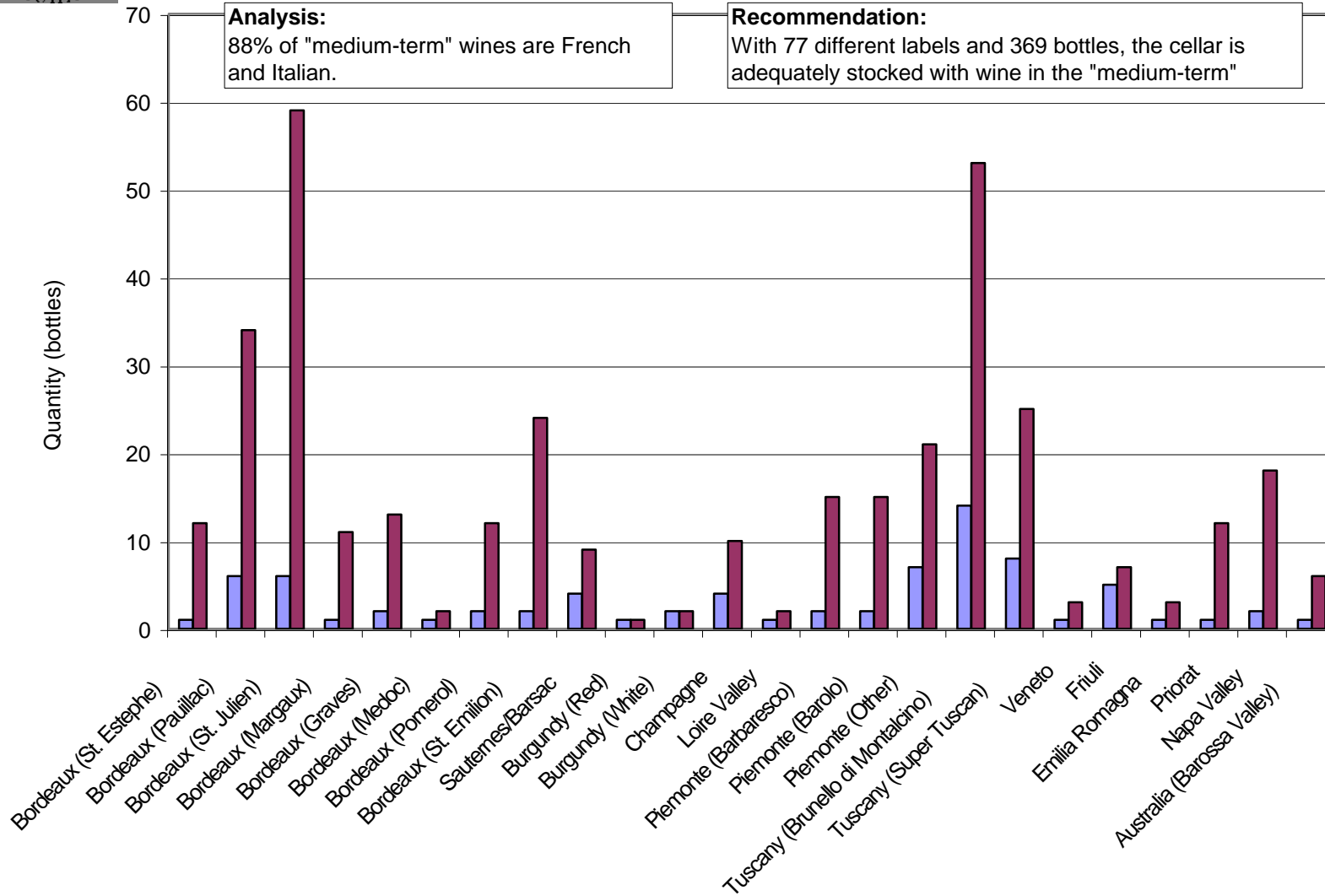
■ # Labels  
■ # btls





### Cellar Distribution by "Medium-Term" (Drink 2005 - 2020) Drinkability

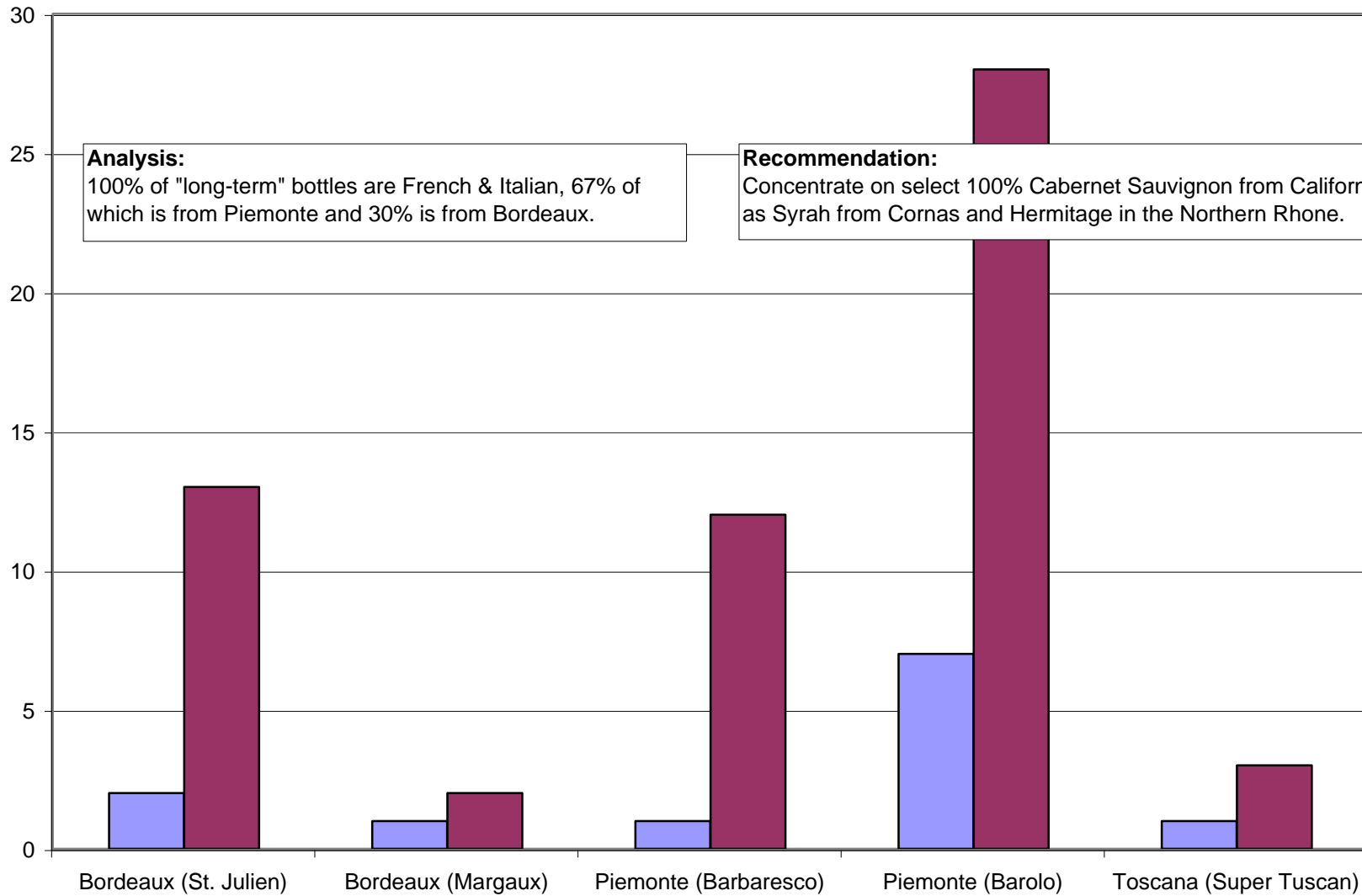
# Labels  
# btls





## Cellar Distribution By "Long-Term" (Drink 2010 - 2040) Drinkability

# Labels  
# btls



**Analysis:**

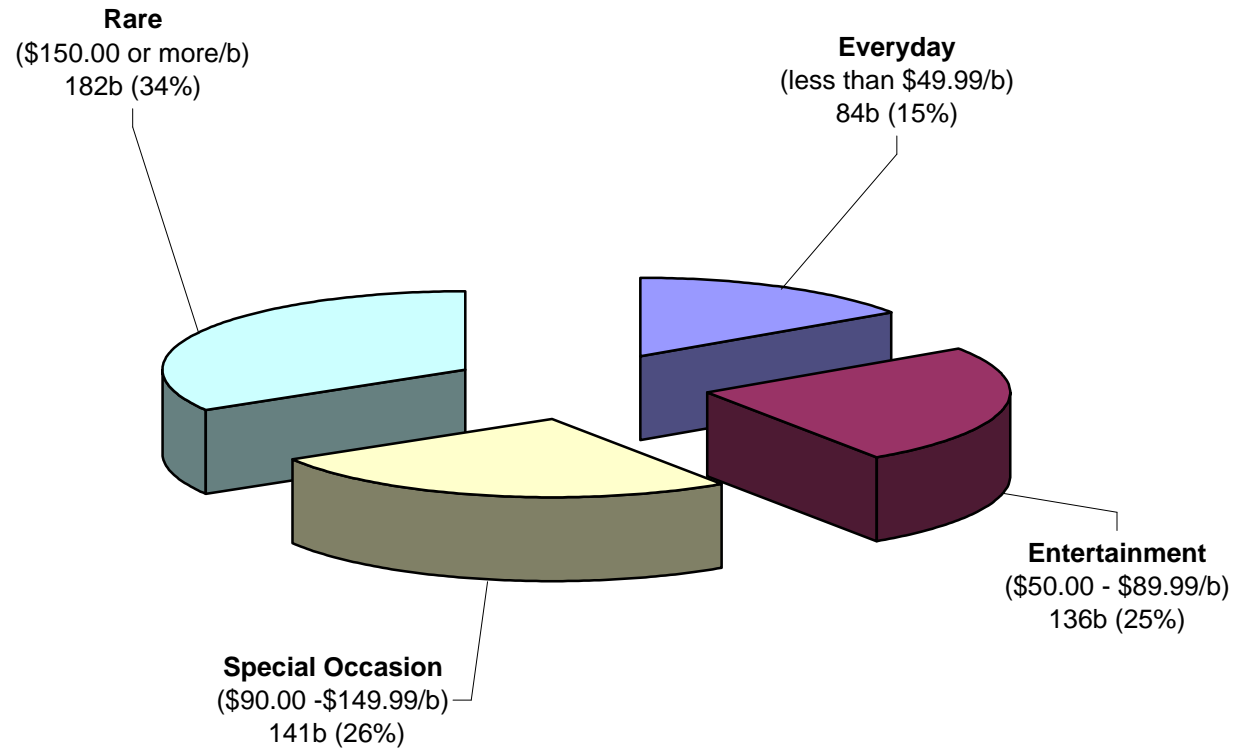
100% of "long-term" bottles are French & Italian, 67% of which is from Piemonte and 30% is from Bordeaux.

**Recommendation:**

Concentrate on select 100% Cabernet Sauvignon from California as well as Syrah from Cornas and Hermitage in the Northern Rhone.



## Cellar Distribution By Price Category



### Analysis:

60% of the cellar is made up of bottles costing \$90 or more. But only 15% are 'Everyday' wines less than \$50/b, half of which are Brunello and assorted white wines.

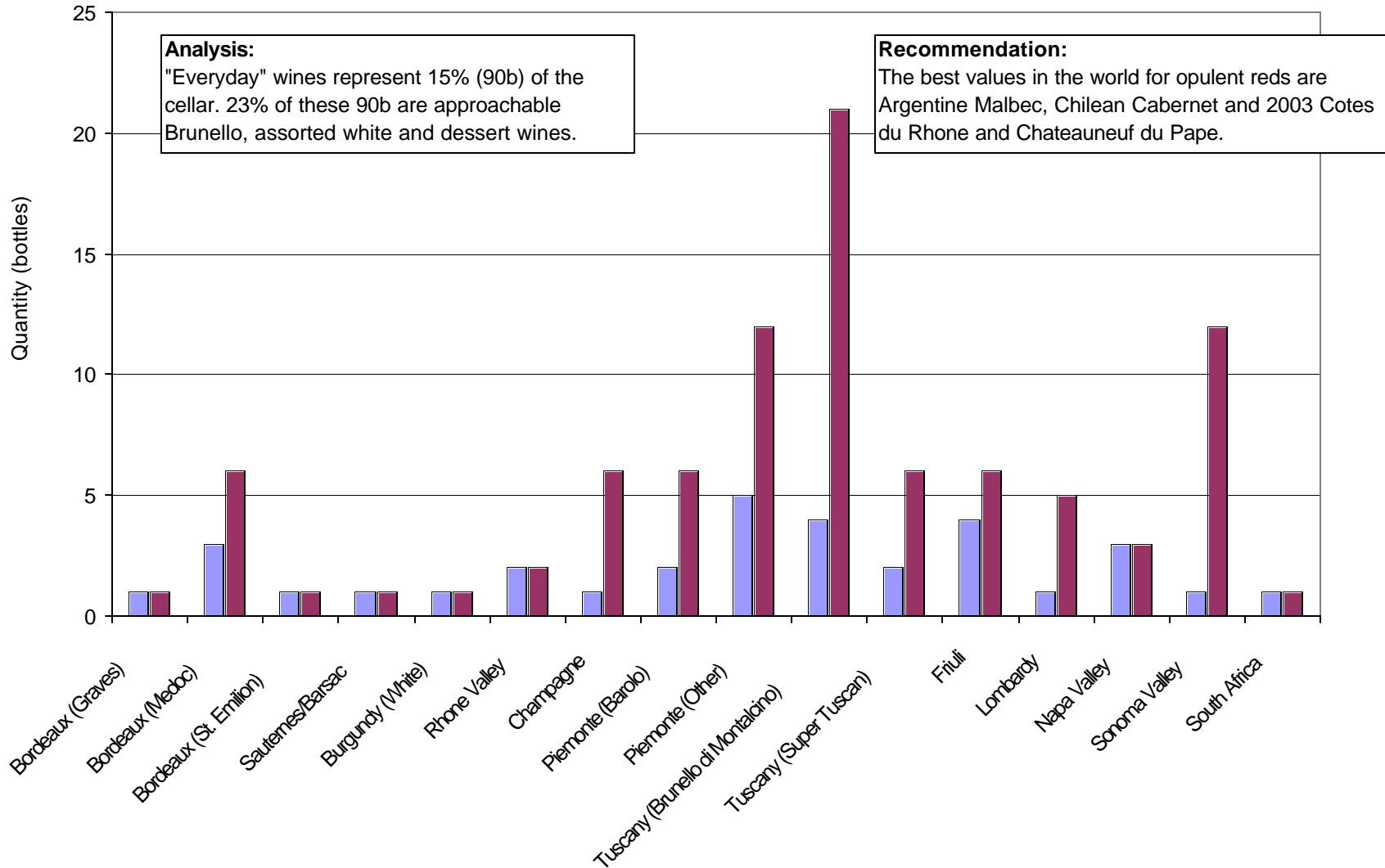
### Recommendation:

Focus on wines with strong price:quality ratio under \$50/b from California, Washington State, Spain, Chile and Argentina.



### Cellar Distribution By Price Category "Everyday Wine" (Less than \$49.99) By Region

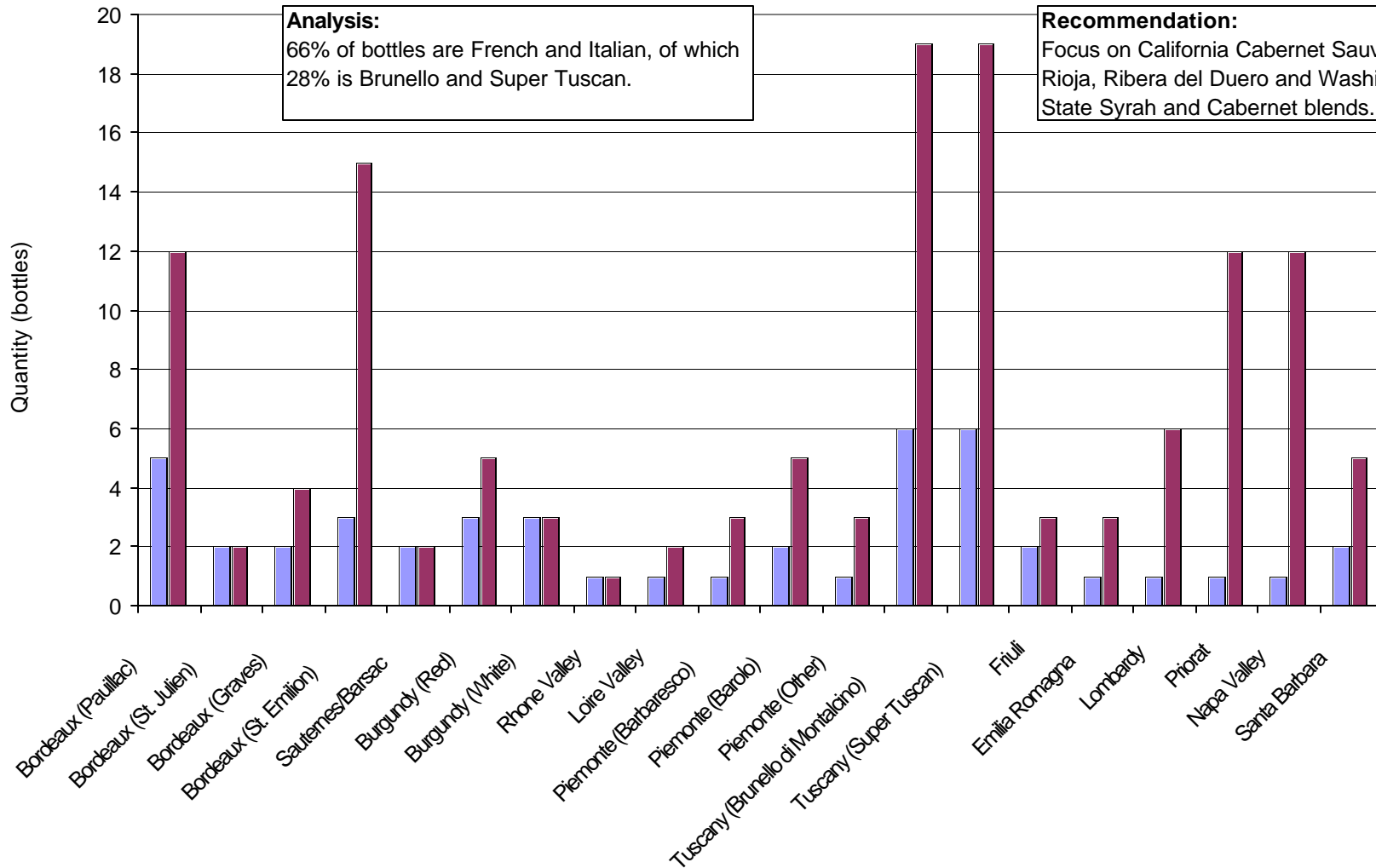
# Labels  
# btls





### Cellar Distribution By Price Category "Entertainment Wine" (\$50.00 - \$89.99) By Region

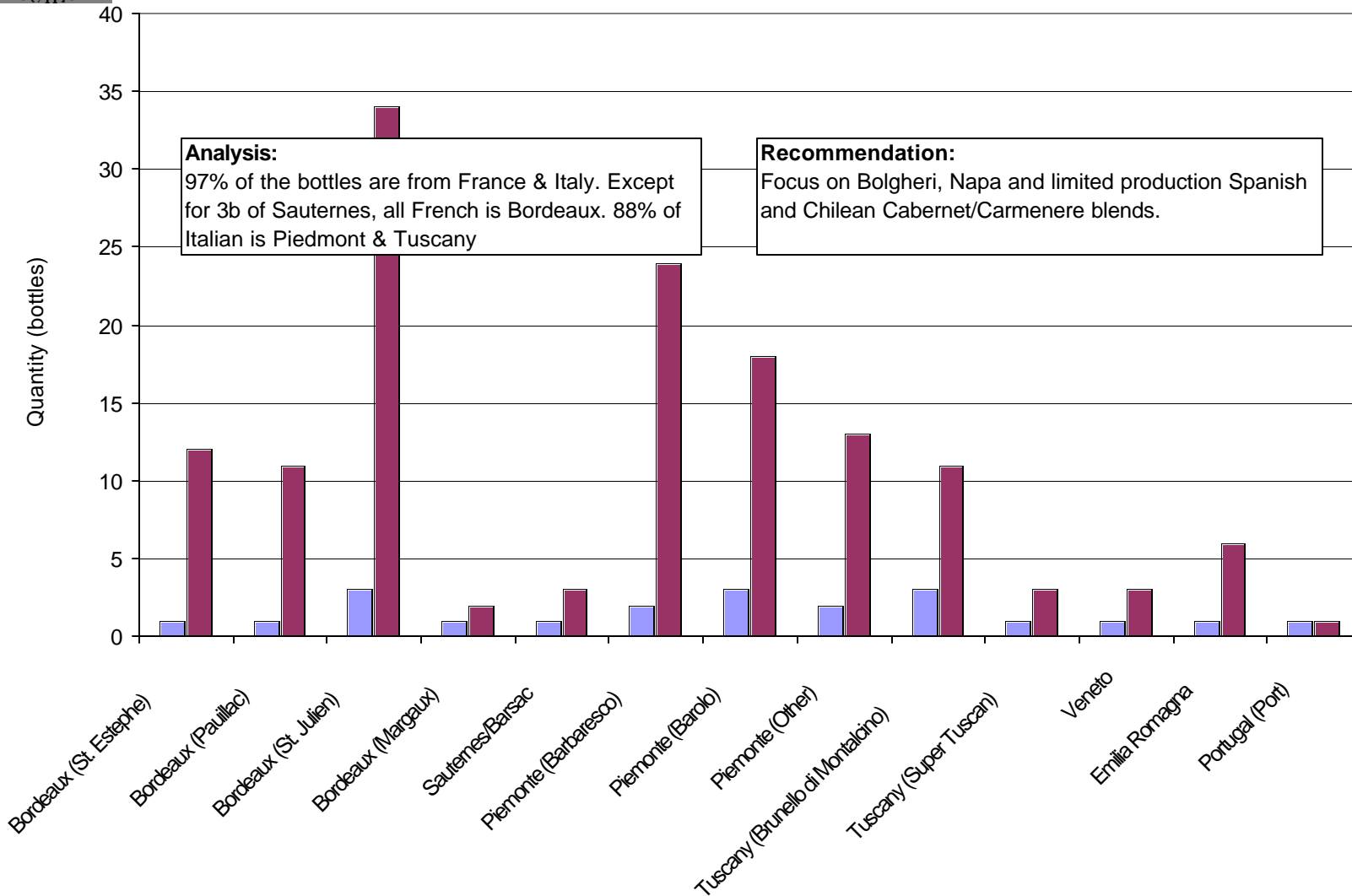
# Labels  
# btls





### Cellar Distribution By Price Category "Special Occasion Wine" (\$90.00 - \$149.99) By Region

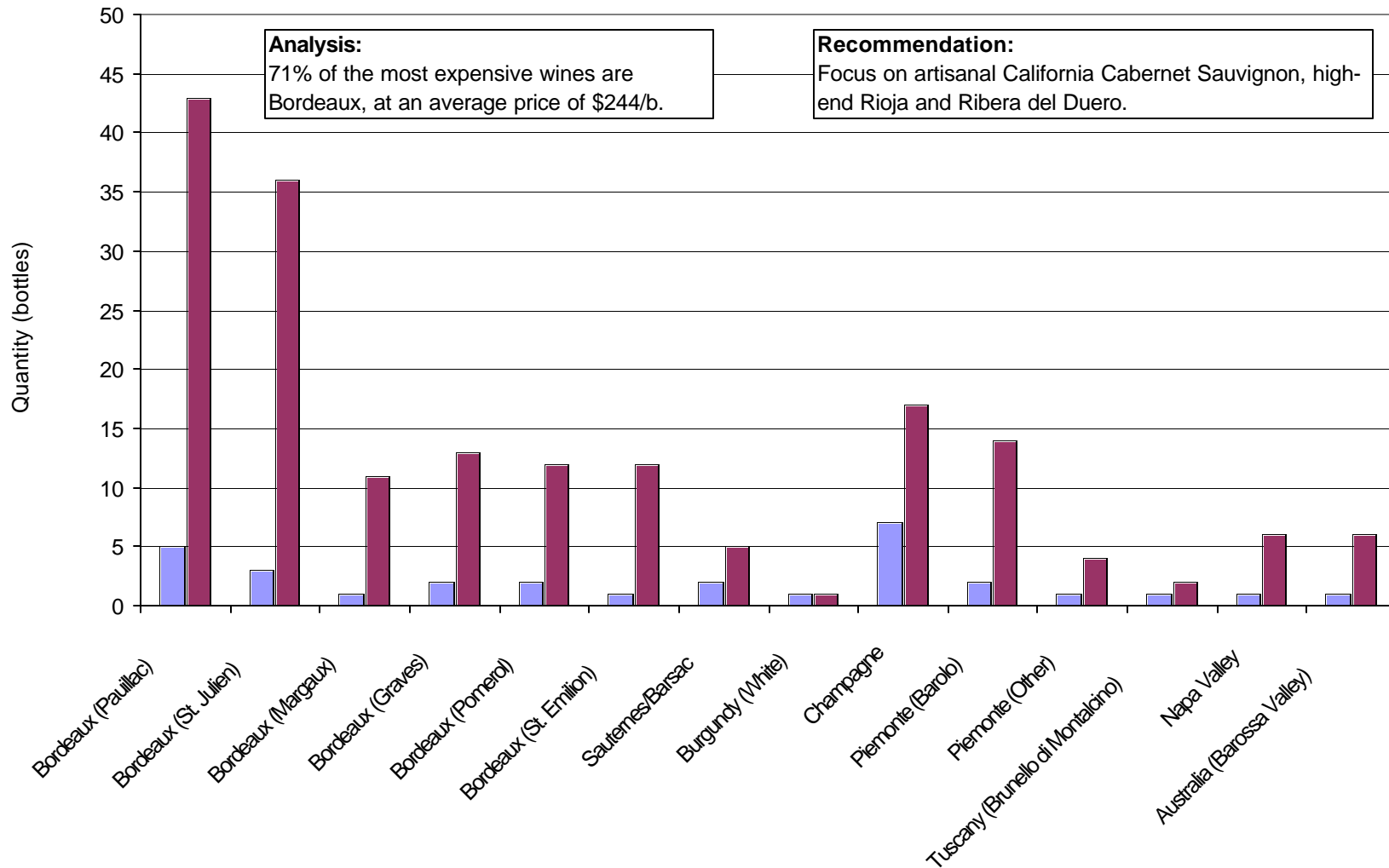
# Labels  
# btls





### Cellar Distribution By Price Category "Rare Wine" (More than \$150.00) By Region

# Labels  
# btls





<b>Budget Worksheet</b>						
Cellar Capacity (bottles):	2,000					
Existing Cellar Base:	600					
Estimated Annual Depletion:	(208)					
Targeted Purchases:	1,608*					
\$ Budget:	\$93,525					
<i>*Note: Targeted bottles includes annual depletion and maintaining 1,400 btl + 208 btl + 208 btl = 1,608 btl</i>						
<b>Buying Strategy (Tier 1): Cellar Staples and Assorted</b>						
IWM Categories	Drinkability	Targeted # of btl	% Total Btl	Average Price	Total Expenditure	% Total Proposed
Mixed Cases	Short-Term	144	9%	\$35	\$5,040	5%
Standards	Long-Term	144	9%	\$150	\$21,600	23%
Miscellaneous Purchases	Assorted	144	9%	\$75	\$10,800	12%
	<b>Sub-Total</b>	<b>432</b>	<b>27%</b>		<b>\$37,440</b>	<b>40%</b>
<b>Buying Strategy (Tier 2): Bottle Price and Drinkability</b>						
IWM Categories	Drinkability	Targeted # of btl	% Total Btl	Average Price	Total Expenditure	% Total Proposed
"Everyday" (\$0 - \$45/b)	Short-Term	761	47%	\$30	\$22,830	24%
"Entertainment" (\$46 - \$89/b)	20% Short-Term	266	17%	\$55	\$14,630	16%
"Entertainment" (\$46 - \$89/b)	80% Long-Term					
"Special Occasion & Rare" (\$90+ /b)	Long-Term	149	9%	\$125	\$18,625	20%
	<b>Sub-Total</b>	<b>1,176</b>	<b>73%</b>		<b>\$56,085</b>	<b>60%</b>
	<b>Total</b>	<b>1,608</b>	<b>100%</b>		<b>\$93,525</b>	<b>100%</b>