



# ORDER FORM 1

## Payment Information



DO NOT WRITE IN THIS BOX

JOB # \_\_\_\_\_

ACCT# \_\_\_\_\_

MAIL DATE \_\_\_\_\_

**IMPORTANT:** Forms must be completed and faxed to us a minimum of 28 days prior to your 1<sup>st</sup> dinner date. 35 days for West Coast.

Primary Contact \_\_\_\_\_ Title(s) \_\_\_\_\_  
 Additional Participant \_\_\_\_\_ Title(s) \_\_\_\_\_  
 Broker Dealer \_\_\_\_\_  
 Company \_\_\_\_\_  
 Address \_\_\_\_\_ Suite/Bldg. \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone # \_\_\_\_\_ Fax # \_\_\_\_\_ Cell Phone # \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Company website address: \_\_\_\_\_  
 Planner's Assistant Name \_\_\_\_\_ Phone # \_\_\_\_\_

### YOUR REQUIRED PAYMENT INFORMATION: FULL PAYMENT MUST BE RECEIVED AT RME 5 DAYS IN ADVANCE OF MAIL DATE

Number of pieces mailed	Rate per piece	Total

Florida Residents must add Sales Tax of 6% PLUS your County Surtax.

**Make Check payable to:** Response Mail Express **Attn: Kara Bishop**  
 PO Box 261237, Tampa, FL 33685-1237  
**Sending Overnight Send to:** 4910 Savarese Circle, Tampa, FL 33634

If there are any changes to billing after submitting this completed form, a pre-invoice will be sent for cardholder's signature.

**Credit Card:** MC Visa AMEX EZ PAY Amount: \$ \_\_\_\_\_  
 Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Sec Code: \_\_\_\_\_  
 Actual Cardholder's Name: \_\_\_\_\_ Signature: \_\_\_\_\_

#### Statement Billing Address for Card:

Same as above address

**If different, please fill out below:**

Name: \_\_\_\_\_ Company: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_

#### Fill out only if applicable:

Additional Participant's Payment Info:

Same billing address as above

**If different, please fill out below:**

Name: \_\_\_\_\_ Company: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ St: \_\_\_\_\_ Zip: \_\_\_\_\_

**Debit Card:** MC Visa  **Credit Card:** MC Visa AMEX Amount: \$ \_\_\_\_\_  
 Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Sec Code: \_\_\_\_\_

Actual Cardholder's Name: \_\_\_\_\_ Signature: \_\_\_\_\_

**DISCLAIMER:** By signing this form we/I agree not duplicate in anyway or harm Concierge Consultation Program, concept or any of its components protected under intellectual property of RME ©2008 and authorize Concierge Consultation to charge your credit card for services provided.

Phone 800-795-2773

National Accounts Manager: **Mark Gaffney** x5327\*Fax (813) 889-4540/[mgaffney@responsemail.com](mailto:mgaffney@responsemail.com)

Production Coordinator: **Kara Bishop** x 5486\*Fax 813-889-4518/[kbishop@responsemail.com](mailto:kbishop@responsemail.com)



# ORDER FORM 2 Restaurant Mailing Data



**IMPORTANT:** Forms must be completed and faxed to us a minimum of 28 days prior to your 1<sup>st</sup> dinner date. 35 days for West Coast.

## MEETING LOCATIONS, DAYS AND TIMES

1. Please provide a restaurant you wish to use for your consultations. Please keep in mind that the restaurant should take reservations for Concierge Consultation to be successful. You may choose more than one restaurant if you prefer to have options available for your prospects. \*\*Restaurant(s) should be a 4-5 "Star" Restaurant.

RESTAURANT #1: \_\_\_\_\_

Use Restaurant Logo  Yes  No Restaurant Website: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ STATE: \_\_\_\_\_

PLEASE CHECK THE DAYS OF THE WEEK YOU **ARE AVAILABLE** TO MEET:

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

LUNCH – PREFERRED MEETING TIME: \_\_\_\_\_

DINNER – PREFERRED MEETING TIME: \_\_\_\_\_

**\*\*Please note: Lunches range between 11am to 3pm. Dinners range between 4pm to 8pm**

RESTAURANT #2: \_\_\_\_\_

Use Restaurant Logo  Yes  No Restaurant Website: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ STATE: \_\_\_\_\_

PLEASE CHECK THE DAYS OF THE WEEK YOU **ARE AVAILABLE** TO MEET:

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

LUNCH – PREFERRED MEETING TIME: \_\_\_\_\_

DINNER – PREFERRED MEETING TIME: \_\_\_\_\_

**\*\*Please note: Lunches range between 11am to 3pm. Dinners range between 4pm to 8pm**

2. PLEASE INDICATE ANY SPECIFIC DATES YOU CAN NOT MEET: \_\_\_\_\_

### Concierge Consultation Invitation and Telephony Design

Use same invitation content/text as last order or previous Job # \_\_\_\_\_

Yes  No **If no**, please complete all 4 Order Forms and fax them in to start processing your order.

**Compliance Disclaimer:** By placing this order you understand and accept all responsibility for securing all industry related compliance approvals for this promotion and agree to hold Response Mail Express (RME) harmless for any and all fines infractions or violations of the law regarding this direct marketing promotion.

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# ORDER FORM 3

## Prescreening Questions



**IMPORTANT:** Please choose up to 3 questions below. This will give you a better understanding of your prospect needs before you meet with them. **Custom Questions may be added to existing scripts for an additional fee.**

### SELECT 3 INFORMATION GATHERING QUESTIONS (RECORD RESPONSE ONLY)

And on a scale of 1 to 5, with 1 being very poor and 5 being excellent, how would you rate your current financial planning situation?

What one thing do you think can be done to improve your current financial plan?

Is there a particular topic that you would like **<Advisor First Name>** to discuss with you at the dinner meeting?

Have you ever attended a FINANCIAL EDUCATION seminar?

Are you currently working or are you retired?

Do you own a business?

When do you plan to retire?

Do you participate in a company-sponsored 401K plan?

Do you have any IRA's, CD's, Mutual Funds, Stocks or Bond's?

Do you currently have a Financial Advisor?

### DISQUALIFYING QUESTION (WILL PROMPT THAT NO MEETINGS ARE AVAILABLE)

Are you currently working with an investment advisor at **<COMPANY>?** (YES/NO)

### Standard Portfolio Question:

And my last question is in regards to the amount of your current investments and savings: Would you estimate that you have more or less than **<XXX>** thousand dollars invested?

Please check the minimum amount of an investment portfolio you require for an appointment:

At least \$5K(no qualifier)    At least \$100K    At least \$250K    At least \$500K    At least \$1M

**\*\*If a prospect refuses to answer portfolio question, the prospect will be allow to book an appointment.**

All appointments will be accessible via the Internet. You will be contacted via email with your access information. Your email address: \_\_\_\_\_

If a prospect needs to call you with questions or to change their meeting date or time, please indicate which telephone number you want them to call? Telephone number: (\_\_\_\_\_) \_\_\_\_\_.

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# MAILING LIST RESEARCH



Your Name: \_\_\_\_\_ Your Company: \_\_\_\_\_  
 Your Phone #: (\_\_\_\_) \_\_\_\_\_ Your Fax #: (\_\_\_\_) \_\_\_\_\_ Your Cell #: (\_\_\_\_) \_\_\_\_\_  
 Your Email Address: \_\_\_\_\_

## SECTION 1 – LIST RESEARCH

Please fill out this section for your List Research and submit by fax or email. We will return your counts per your criteria below.

Please fill-in the desired Age and Household Income below:

Age: \_\_\_\_\_ to \_\_\_\_\_  Home Owners,  Income Producing Assets **OR**  Net Worth

\$100K+  \$250K+  \$500K+  \$750K+  \$1M+

**We recommend doing an initial radius search for your first list research report.**

Provide only 1 zip code for Radius Search:

Zip code to use as epicenter to run Radius Count from: \_\_\_\_\_ Miles \_\_\_\_\_

**OR**

Provide at least 5 zip codes from your mailing area:


## SECTION 2 – FINAL LIST ORDER AND INSTRUCTIONS

After receiving your List Research, complete your order by circling the zips and quantities on the list research pages **or** providing instructions in the section below and faxing them back with your completed order forms and invitation text. This constitutes your order.

**TOTAL QUANTITY TO MAIL (REQUIRED):** \_\_\_\_\_

**NOTES/INSTRUCTIONS:** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**NOTE:** Concierge Consultation is **NOT** responsible for crossover mailings between planners. As a representative of my company, we agree to not duplicate in any way or form the Concierge Consultation Mailing Program, concept or any of its components protected under intellectual property of RME ©2008. We **CANNOT** check other zips being mailed and do not offer exclusive territories. Census tracts and other variables that make up a formula compile all major national lists. Lists are **NOT** 100% accurate because all information and demographics are inferred. Deliverability and accuracy can be anywhere in the 95% to 97% ratio. Lists rarely encompass 100% of the population of the zip codes.

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### Proprietary Information/Non-Disclosure Agreement

This Proprietary Information/Non-Disclosure Agreement (“Agreement”), made this \_\_\_\_ day \_\_\_\_ of \_\_\_\_, is by and between \_\_\_\_\_. (Hereinafter “Company”), and RME Holdings, LLC d/b/a Response Mail Express, (hereinafter “RME”), a Florida corporation.

**Recitals:**

- Company and RME intend to discuss certain matters regarding potential business opportunities.
- In connection with these discussions, certain confidential and propriety information regarding each party to this Agreement (such party a “disclosing party”) may be disclosed to another party to this Agreement) such party a “recipient” or “recipient party”)
- Company and RME agree to be bound by the terms of the Proprietary Information/Non-Disclosure Agreement, which has been previously provided to Company by RME.

RME: _____	Company: _____
By: _____	By: _____
Print Name: _____	Print Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

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## Helpful Tools



### How to locate a Restaurant

To locate a restaurant go to [www.google.com](http://www.google.com), click on maps, enter your zip code or city, state where you want to hold your seminar, click on search map button, click on find businesses link, enter the word restaurant, click the search restaurant button.

### How to find Maps of Zip Code areas

1. Enter the following URL: <http://zip.langenberg.com/>
2. Scroll to the bottom of the page and look for the section titled: ZIP CODE BOUNDARY MAPS
3. Type in the City and State in the appropriate box, and hit GO
4. If you get multiple results, click on the selection that has the words COUNTY SEAT in parentheses
5. Using the zoom tool on the right side of the map window, click on the number
6. This will zoom you out and you can see all the zip codes covered in a given City. You can continue to use the map tools to move around, zoom in and out to identify a specific area. (Note: If you know the zip code(s) but want to confirm their location, you can also use this site by typing in the zip in at step 3 above)

### How to Find ALL the Zip Codes for a Particular City (Zip codes only, no map)

#### US Postal Service

1. Enter the following URL: [http://www.usps.com/ncsc/lookups/lookup\\_crystzip.html](http://www.usps.com/ncsc/lookups/lookup_crystzip.html)
2. Enter the City and State and hit PROCESS This will give you the list of all Zip codes under that city **OR** Enter the following URL: <http://www.census.gov/cgi-bin/gazetteer>2. Enter the City and State and hit SEARCH this will give you a full listing of all the zip codes.

### Mailing List Helpful Hints

#### Ages to prospect:

Pre-Retirees – Age 50 at an absolute minimum, but 55+ has drawn better

Retirees – Ages 60-79

#### Income:

Pre-Retirees - \$100K +

Retirees – \$50K

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