



ORDER FORM 1

Payment Information



DO NOT WRITE IN THIS BOX
JOB # _____
ACCT# _____
MAIL DATE _____

IMPORTANT: For Newspaper advertising, forms must be completed and faxed to us a minimum of 10 Days prior to ad run date.

Broker/Agent: _____ Title(s) _____ E-mail: _____

Primary Contact: _____ Title(s) _____ E-mail: _____

Additional Participant: _____ Title(s) _____ E-mail: _____

Company _____

Address _____ Suite/Bldg. _____

City _____ State _____ Zip _____ Website: _____

Phone #: (____) _____ Fax #: (____) _____ Cell #: (____) _____

Planner's Assistant Name _____ Phone # (____) _____ x _____ E-Mail: _____

YOUR REQUIRED FULL PAYMENT INFORMATION MUST BE RECEIVED 5 DAYS IN ADVANCE OF MAIL DATE

Number of pieces mailed	Rate per piece	Total

Florida Residents must add Sales Tax of 6% PLUS you're 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, an invoice will be sent for cardholder's signature.

Debit Card: MC Visa **OR** **Credit Card:** MC Visa AMEX EZ-Pay (please one)

Card #: _____ Exp. Date: _____

3-Digit Security Code: _____ (required to process credit card payment) **Amount: \$** _____

Actual Cardholder's Name: _____ Signature: _____ (Required)

Statement Billing Address for Card: Same as above address (If different, please fill out below)

Name: _____ Company: _____

Address: _____ City: _____ St: _____ Zip: _____

Additional Participant's Payment Info: Same billing address as above (If different, please fill out below)

Debit Card: MC Visa **OR** **Credit Card:** MC Visa AMEX EZ-Pay (please one)

Card #: _____ Exp. Date: _____

3-Digit Security Code: _____ (required to process credit card payment) **Amount: \$** _____

Actual Cardholder's Name: _____ Signature: _____ (Required)

Statement Billing Address for Card: Same as above address (If different, please fill out below)

Name: _____ Company: _____

Address: _____ City: _____ St: _____ Zip: _____

Is a 3rd party paying for the whole/part of mailing? Yes No if yes please fill out below: Amount? \$ _____

Name: _____ Title(s) _____ E-mail: _____

Company _____

Address _____ Suite/Bldg. _____

City _____ State _____ Zip _____ Website: _____

Phone #: (____) _____ Fax #: (____) _____ Cell #: (____) _____

DISCLAIMER: As a representative of my company, we agree to not duplicate in any way or form the HotProspects! Program, concept or any of its components protected under intellectual property of RME © 2008 and authorize HotProspects! 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

Production Coordinator: Kara Bishop x 5486*Fax 813-889-4518/kbishop@responsemail.com



ORDER FORM 2 PRODUCT SELECTION



IMPORTANT: For Newspaper advertising, forms must be completed and faxed to us a minimum of 10 Days prior to ad run date.

Your Name: _____ Your Title: _____

You're Company: _____

Your Phone #: (____) _____ Your Fax #: (____) _____ Your Cell #: (____) _____

Which Email Address(es) do you want the mailing list research sent to? _____

1. WHICH OF THE THREE (3) HotProspects! PRODUCTS ARE YOU SELECTING?

- Newspaper Ad Express Postcard Express Advisor Letter Express Advisor Power

A. IF YOU ARE CHOOSING NEWSPAPER AD, please complete the below section 1?

SECTION 1 – NEWSPAPER RESEARCH

(HotProspects! ADVISES USING A NEWSPAPER WITH A CIRCULATION OF AT LEAST 100K FOR THE BEST RESULTS.)

Newspaper: _____

Day(s) to Run: Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Date(s) to Run: _____ Section(s): _____

Information Below to be filled out by HotProspects!

Ad Size and Price:

- 1/16th page - \$ _____ Multiple Dates \$ _____ Dimensions: Height _____ Width _____
- 1/8th page - \$ _____ Multiple Dates \$ _____ Dimensions: Height _____ Width _____
- 1/4th page - \$ _____ Multiple Dates \$ _____ Dimensions: Height _____ Width _____
- 1/2 page - \$ _____ Multiple Dates \$ _____ Dimensions: Height _____ Width _____
- Other - \$ _____ Multiple Dates \$ _____ Dimensions: Height _____ Width _____

SECTION 2 – FINAL AD PLACEMENT AND INSTRUCTION

After receiving your newspaper ad cost/placement information above, complete your order by checking the size of the advertisement you want to place and indicate the date(s) you want the ad to run **or** provide instructions in this section below and fax back with your completed order forms. This constitutes your order.

NOTES/INSTRUCTIONS: _____

B. IF YOU ARE CHOOSING ADVISOR LETTER EXPRESS, WHICH LETTERHEAD WOULD YOU LIKE TO USE? **A** Business Style (double window) **D** OPTIONAL – Reply Card

B Full Window Style (full view window) **E** OPTIONAL – Insert (Bio card, info cards)

C Designer Style (full view window)

2. WHICH OF THE SEVEN (7) HotProspects! TOPICS ARE YOU SELECTING?

- TAX PLANNING LONG TERM CARE RETIREMENT PLANNING PERSONAL FINANCE
- INVESTING EDUCATION INSURANCE

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 2 PRODUCT SELECTION CONTINUED



3. WHICH "WHITE PAPER" DO YOU WANT TO OFFER?

TAX PLANNING

- "The Early Bird May Get tax Savings"
- "Tax Tips From the IRS"

LONG TERM CARE

- "Assessing Long-Term Care Needs"
- "Long-Term Care: The Financial Building Blocks"

RETIREMENT PLANNING

- "When it Comes To Retirement – Age Matters"
- "Retirement Planning to Reach Your Goals"
- "Early Retirement: Some Rules of the Road"
- "Calculating Your Retirement Needs"

PERSONAL FINANCE

- "Money Management Tips for "Generation Xers"
- "Life Events and Your Finances"
- "Seven Steps to a Sound Financial Future"

INVESTING

- "Diversification: Composing Your Financial Symphony"
- "Your Portfolio and Tax-exempt Investments"
- "Managing Risks and Meeting Goals"

EDUCATION

- "Funding 529 Plans with UGMA/UTMA Assets"

INSURANCE

- "Inflation and Your Insurance Coverage"
- "Life Insurance through Life Stages"
- "Life Insurance – Analyzing Your Needs"

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MAILING LIST RESEARCH FOR POSTCARD/LETTER OPTIONS



IMPORTANT: For Newspaper advertising, forms must be completed and faxed to us a minimum of 10 Days prior to ad run date.

Your Name: _____ Your Title: _____

You're Company: _____

Your Phone #: () _____ Your Fax #: () _____ Your Cell #: () _____

Which Email Address(es) do you want the mailing list research sent to? _____

Your Mailing Date: _____

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 _____ TO _____

Household Income: \$30K+, \$40K+, \$50K+, \$75K+, \$100K+, \$125K+, \$150K+ **OR**

Household Income Range: \$30K-\$39,999+, \$40K-\$49,999, \$50K-\$74,999, \$75K-\$99,999, \$100K-\$124,999, \$125K-\$149,999 **OR** Yes or No Other Income Range \$ _____

Yes or No-Net Worth \$100K+ \$150K+ \$250K+ \$500K+ \$750K+ \$1mm+ (may incur optional cost)

Yes or No-Definite Homeowner (may incur optional cost)

Yes or No-Phone # (where available) Requires SAN # (may incur optional cost): _____

Yes or No-Other (may incur optional cost) _____

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

Provide only 1 zip code for Radius Search: _____

Radius Count Miles from: 5 10 15 20 25, Out far enough to reach quantity **OR**

Provide at least 5 zip codes from your mailing area: _____, _____, _____, _____, _____, _____, _____, _____, _____, _____

SECTION 2 – FINAL LIST ORDER & 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 complete order forms and invitation text. This constitutes your order. **Final number to mail (Required):** _____, **List Research # for Reference:** _____

Additional List Service (May incur additional cost): Additions, Delete List, Dedupe Request, Sending to Corporate for Scrubbing

NOTES/INSTRUCTIONS: _____

Signature (Required): _____ By signing this I have read and understand all information on this form and authorize the list to be ordered.

NOTE: RME 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 Seminar Success 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. Like any other media RME does not guarantee direct mail results.

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Helpful Tools

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_ctystzip.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/gazetteer2>. 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 - \$50k or \$75K +

Retirees – \$30K - \$70K

Targeting higher incomes has had an adverse impact on response

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