

Please complete the order form below and fax to your Advisors Marketing account manager.
If you are providing us with a list of your own, please send an .xls or .csv file.

Client Name: _____ Company: _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ E-mail: _____

Please answer the following questions:

- | | | |
|--|------------------------------|-----------------------------|
| 1. I am providing a list to Advisors Marketing | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. In addition to my list, I would like Advisors to acquire a list for my mailing | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. I would like my previously used list to be scrubbed. Additional fee will apply. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. I have a list for deletions from my list order | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. I have a list for additions to my list order | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Consumer List Research Criteria

Please check desired criteria below

Age

- From ____ to ____
 or ____+

Household Income

- \$30K+
 \$35K+
 \$40K+
 \$45K+
 \$50K+
 \$75K+
 \$100K+
 \$125K+
 \$150K+

No Income

Estimated Investible Assets

\$ _____ + (available in \$100k increments up to \$1.8 million)

Please enter up to 8 zip codes in your area.

_____	_____
_____	_____
_____	_____
_____	_____

zip code search
your zip code / # of miles to radius out

Please read and sign below:

Advisors Marketing strives to avoid crossover mailings between planners, but cannot 100% guarantee it. We check other zip codes as best as possible and offer and try not to mail to the same zip codes at similar times. All major national lists are compiled by census tracts and other variables that make up a formula. Lists are NOT 100% accurate because all information and demographics are inferred. Deliverability and accuracy is typically anywhere in the 95% to 97% ratio. Lists rarely encompass 100% of the population of the zip codes specified.

X _____ Signature is necessary in order to process your lists.

Fax completed form to (813) 249-6073 Attention: Advisors Marketing Sales

Upon receipt of this order form, we will fax your counts to you, typically within 48-72 hours. Final count approval must be obtained prior to final production approval.