



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 1st 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
4910 Savarese Circle, Tampa, FL 33634
ATTN: **Elsa Herndon**

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: _____

Phone 800-795-2773

National Accounts Manager: **Brenda O'Donnell** X5263*Fax 813-883-3526 / bodonnell@responsemail.com

Production Coordinator: **Elisa Herndon** X5267*Fax 813-883-3554 / herndon@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 1st 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.

Phone 800-795-2773

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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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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: _____

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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, 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
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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