



800-992-9663      84 Faunce Corner Rd.  
www.tryplum.com      Dartmouth, MA 02747

Marketing Advisor: \_\_\_\_\_

### Contact Information

Company Name: \_\_\_\_\_

Advisor Name: \_\_\_\_\_ Email: \_\_\_\_\_

Additional Participant: \_\_\_\_\_ Website: \_\_\_\_\_

Wholesaler/FMO: \_\_\_\_\_ Broker Dealer: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Cell: \_\_\_\_\_

Business Address (address on piece): \_\_\_\_\_

Do you have a business logo?  Yes  No      If yes, please email to marketing advisor 300dpi jpg or vector art (.eps/.ai)

Are you a NEA member?  Yes  No      Are you a BBB member?  Yes  No

Any other logos you would like to use? \_\_\_\_\_

### Target Demographics

Age Range: \_\_\_\_\_ Income Range: \_\_\_\_\_ Single Family Dwelling:  Yes  Single  Married

Homeowner (+.01):  Yes      Women only? (N/C):  Yes

Net Worth (+.04):  Yes      Suppress List (from previous mailing):  Yes  No

Income Producing Assets:  Yes (+.04)      Active Investments:  Yes (+.02)

Ethnic Select:  Yes (+.03)      Do you have a Do Not Mail List?  Yes  No

Race Code (+.01):  Asian  African American  Hispanic  White/Other: \_\_\_\_\_

### Notes

### Mailing Information

Normal Zip Code Radius: \_\_\_\_\_ from venue.       Exact Zip Codes:

Standard Mail       1st Class Mail (+\$0.12)       Use same mailer from last seminar       Drip Included

Style of Mailer:  Wedding Style Package (6x9 closed window)       #10 Full Window 8.5x14       #10 Full Window 8.5x11  
 6x9 Full Window       #10 small window 8.5x14       #10 Small window 8.5x11

Extras:  Black & White       Color

8.5x5.5 Card       4x6 Card       4x5 Card       3.666x8.5 Card       3.666x8.5 BRC

Postcard:  4x5.5       5.5x8.5       5.625x11       5.5x8.5 Foldover (folds to 4x5.5)

Self Mailer:  8.5x11 (folds to 5.5x8.5)       8.5x11 Trifold       8.5x17 (folds to 5.75x8.5)       14.5x6 folds to 5.5x6

Quantity of Mailers: \_\_\_\_\_ @ \$ \_\_\_\_\_ each = \$ \_\_\_\_\_ (Total Cost)

Blank Mailers?  Yes, Quantity: \_\_\_\_\_  No

Seminar/Workshop Information	Event 1	Event 2	Event 3	Event 4
Date/Time				
Location				
Address City, State Zip				
Seating Capacity				

Landing Page:  Yes  No    Landing Page Template: \_\_\_\_\_

Using agent bio:  Yes  No    Using agent headshot:  Yes  No

Preferred URL: \_\_\_\_\_ 2nd choice: \_\_\_\_\_

**Speaker(s)**

**Seminar/Workshop Title**

**Menu (not applicable for workshops)**      **Notes**

**Teledirect Services**

RSVP     Call Recording     Entree Choices     Confirmations

**Payment Details**

ACH     Visa     Mastercard     Amex     Discover

Name (as it appears on account/card): \_\_\_\_\_

Billing address same as contact address?

Address (if different): \_\_\_\_\_      Billing Zip Code: \_\_\_\_\_

Card #: \_\_\_\_\_      Expiration Date: \_\_\_\_\_      CVV#: \_\_\_\_\_

Payable Amount: \$ \_\_\_\_\_      Cardholder Signature: \_\_\_\_\_

**Agreement**

This form must be completed and submitted to Plum Direct Marketing a minimum of 30 days prior to your first seminar date. Failure to do so will result in an additional fee of \$250.00. Included in your payment is the creative design of ONE proof and minimal changes to this proof. New designs will incur a design fee of \$100.00. By Placing this order I acknowledge and agree that PLUM does not guarantee response rates, results or delivery by the USPS. I will not hold PLUM liable for mail which is delayed due to my lack of payment, written approvals, or the inability of the USPS to deliver mail for any reason including weather related delays. By signing above, I represent I am an authorized signer on the credit card listed and hereby authorize PLUM to charge my card. Further, I understand and agree that all mailing lists are created from national consumer information compiled by only the most reputable US firms and rates are for single, one-time use only. Lists supplied cannot be 100% accurate, and mailing lists used may not be 100% deliverable. Results of this mailing are not guaranteed. You agree to the information on this page that you have submitted. You also agree that if you cancel this order after submitting this agreement, any payment will be credited towards a new marketing campaign in the future. No refunds will be issued by Plum Direct Marketing. By signing this order form you take full responsibility for complying with and communicating to PLUM all state or federal laws regarding marketing, license or disclosures requirements.

Client Signature: \_\_\_\_\_      Date: \_\_\_\_\_