LET'S TALK Order Form

Let's Talk Money® newsletter is produced bimonthly for your customers or prospects and is available in four versions:









Article Summaries available at www.letstalkmoney.com/as



Print and PDF Edition

Customized Masthead Four different colors to choose from.

Personalized Includes color photo, logo, contact information and custom message.

Broker-Dealer Disclosures If required.

Multi-Channel Distribution Deliver timely content in print and electronic channels for optimal response rates.

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Personalized Includes your color photo, logo and contact information.

Easy To Use Maintain and track your e-mail list with our simple online tool.

Due to compliance restrictions, not all versions and/or output options may be available. Please call us for details at LTM Client Marketing.



ORDER FORM | Customize your newsletter

Please print all information as you wish it to appear on your newsletter.

MODIFICATION 2017	NEY		
What have your investments been up to lately? If And maybe some took a swan dive. Either way, y			_
What can you do about it? Rebalancing	ALCOHOL:	Karen Petrucco Account Manager	
helps you restore your asset mix to the	No. of Concession, Name of Street, or other Designation, or other		
percentages of stock, bond and cash alternative investments you originally	No. of Street, or other Desires.	LTM Client Marketing	_
chose when you set up your account.	The second second second	125 Wolf Road, Suite 407 Albany, NY 12205	
And if your feelings about risk have			
changed, rebalancing can help bring	The second second	Tel: \$18-870-1082 Fax: 800-720-0780	
your asset allocation in line with your	ALCOHOL: NAME OF TAXABLE PARTY.	koetyccoeltracientmarketing.com	
current risk tolerance. Your Assi	ot Misc	www.hnclentmarketing.com	
		Lam committed to helping my	
You may have selected your Briti	ng it	clients achieve their financial	
		goals for themselves, their	
francial plan or strategy that you and	ack	families and their businesses by	
your financial professional created to fit	. I :	providing them with strategies	
your investment time frame and risk	n Line	for asset accumulation,	
tolerance. But your asset mix can		preservation and transfer.	
become unbalanced when one type of			
Investment rises or falls significantly in value. Investments that have made substantial cains.	Another strategy is to sell investments in the		
may make up a larger portion of your portfolio	asset class that's doing well and buy investments		
— and expose you to more risk — than you	in the classes that are struggling. While you might		
intended. Ot if some of your assets have	be hesitant to sell investments whose values are		
dropped in value, your portfolio may not be	rising remembering that you chose your asset allocation to reflect your goals, time horizon and		
earning returns that will allow you to pursue	risk tolerance can put rebalancing in perspective.		
your investment goals. Reviewing your			
investments' performance can help you	Consider reviewing investment performance		
determine what steps, if any, you need to take	annually, semiannually or even quarterly. That		
to get your portfolio back on track.	way, you'll be able to make any changes needed to help ensure that your portfolio continues to		
Rebalancing options	to help ensure that your portfolio continues to reflect your investment objectives.	Standard Version	
One way to rebalance your portfolio is to direct a	nenect your investment objectives.		
larger percentage of your new contributions to	Rebalancing may have tax consequences if done	LTM Clent Marketing	
	outside of a tax-favored retirement account.	Partners in your marketing success	
the asset class that's currently underperforming.			
	g, an unrelated third party. Articles are not stive.		
the asset class that's currently underperforming. The sender and LTM Client Marketing are unne publication's provider by LTM Client Marketin	g, an unrelated third party. Articles are not		

1 Custom Masthead (Please choose only ONE)						
	MONEY	LET'S TALK MONEY	LET'S TALK	MONEY		
2	2 Photo/Logo					
	3 Send E-mail	☐ On File	☐ Blank			
Digital image must be in JPG, TIFF or EPS format (300 dpi). Actual photo must be 3" x 4" and in color.						
Send to: info@ltmclientmarketing.com						

3 Contact Information

Name:(Your name, not agency)	If you are licensed in Arkansas or California, please indicate your Life Insurance License number and carrier:		
Designation:			
Title:	☐ I am NOT a Registered Representative		
	☐ I AM a Registered Representative		
Company:	☐ I AM an Investment Advisor Representative		
Address:	☐ I AM a Dually Registered Advisor (using corporate RIA)		
City:	☐ I AM a Hybrid Advisor; my SEC Registered Firm Name:		
State: Zip Code:			
Business Number:	If you are a Registered Representative, the following line must appear on the imprint area of your newsletter to be within FINRA compliance		
Toll-free:	requirements. (Your Broker-Dealer may require a variation of this line.)		
Fax:	Registered Representative of and securities offered through:		
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E-mail:	Broker-Dealer Address:		
Website:	City:		
Affiliations/Memberships:	State: Zip Code:		
Other:	Check with your Broker-Dealer and life company to see if you need to submit to them the personalized section of your newsletter for review.		

4 Custom Message

☐ Option 1: I'm committed to helping my clients achieve their financial goals for themselves, their families and their businesses by providing them with strategies for asset accumulation, preservation and transfer.		☐ Option 3: Text attached: Maximum 10 lines, 23 characters per line. Note: Due to compliance restrictions, custom messages may be limited.							
	-	on 2: alizing in: (Please select a maximum c	of five)						
]	Retirement Planning		Life Insurance		Annuities		Other:	
		Estate Preservation		Health Insurance		401(k)			
]	Tax Planning		Disability Insurance		IRAs & SEPs			

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Please complete the following sections for us to fulfill your order.

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Total Quantity	Subscription with Mailing Services & Postage*	Subscription Bulk-shipped	S&H**	☐ Print subscription with mailing
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100-124	\$1.39	\$0.74	\$13.00	☐ Print subscription with kitting services
125-249	\$1.36	\$0.71	\$16.00	Every issue will be produced, unless our offi
250-499	\$1.30	\$0.67	\$18.00	is notified otherwise. Written notification
500-999	\$1.25	\$0.64	\$20.00	must be received 45 days in advance of the
1,000+	\$1.22	\$0.61	\$26.00	publication date.
eNewsletter/Online Version Pricing*** \$40 per issue				□ PDF only
		PDF \$35 per i	ssue	☐ Add E-mail Edition with printed newsletter
	issue	\$35 per i with the printed		☐ Add E-mail Edition with printed
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	<i>y</i> ,

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ORDER FORM | Authorization

Accepted Payment Methods

How to provide your credit card information:











Order Authorization

I authorize **LTM Client Marketing** to process charges to my credit card on an ongoing basis as per my order above. This authorization is to remain in effect until **LTM Client Marketing** has received written notification of termination from me in such time and in such manner as to afford **LTM Client Marketing** a reasonable opportunity to cancel my order in a timely and favorable fashion. Charges to your credit card will appear as: **ltmcm.com 800-243-5334**

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I have read and agree to the above Limitation of Liability disclosure. I submit my order for processing.

Customer Signature or Authorized Person:		
	Date:	
	Date	

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