

Please type or print clearly.

Company Name _____

Billing Address _____

City _____ State _____ Zip _____

Shipping Address (No PO boxes) _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

Company Representative _____ Title _____

Special Instructions _____

Printed Booklet Quantity _____

Imprint Options Choose one option only.

No Imprint

Custom Imprinted Check all that apply.

Set type for imprint per attached instructions

Imprint on front cover only

Disk with art for imprint enclosed

Imprint on back cover only

Artwork for imprint on file at Newkirk

Imprint on front and back covers

Artwork e-mailed to Newkirk at jrryan@newkirk.com

Proof requested

Internet/HTML Format Your e-mail address for link delivery: _____

Roth Conversion Analyzer Your e-mail address for link delivery: _____

PowerPoint® Presentation

Order By Mail if you are sending artwork for your imprint. Mail to Newkirk, 15 Corporate Circle, Albany, NY 12203.

Order By Fax at 518-862-3355 if you are not sending artwork for your imprint.

Questions?  **Call 800-525-4237** or e-mail info@newkirk.com.

Although efforts are made to comply with legal and regulatory requirements for the presentation of information contained in this publication, Newkirk makes no representation or warranty as to the legal or regulatory sufficiency.

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PRINTED BOOKLETS

Custom Imprint Option

- ▶ Can include logos and special typefaces
- ▶ Imprint on front and/or back cover
- ▶ Ships in 10-15 working days (transit time not included)

Your imprint information is printed in black. (Color imprint available; please call for pricing.) The space available is approximately 2½" wide x 2½" deep on the front cover and 3" wide x 7" deep on the back cover. Please provide your logo and artwork on a disk or send to Newkirk by e-mail. Newkirk can typeset your imprint at no additional charge and will provide you with a proof.

If Newkirk has your imprint on file from a prior order for a booklet of the same size (and no changes are required), your booklets will be shipped in approximately 10 working days from receipt of your completed order form and payment. If we are creating your imprint from scratch, your booklets will be shipped in approximately 15 working days.

Printed Booklets - Custom and Unimprinted

Quantity	Custom Imprinted
50 - 199	n/a
200 - 499	\$1.25
500 - 999	1.20
1,000 - 2,499	1.05
2,500 - 4,999	1.00
5,000 or more	.90

Unimprinted (available in lots of 25) @ \$1.75 each. Add 8% for shipping and handling (\$15 minimum).

ONLINE VERSIONS

License agreement and additional terms on back page.

Purchase the Internet/HTML version and bring traffic to your website. You'll receive the right to hyperlink from your website to the *Roth Conversions: A Closer Look* Internet/HTML version for one year. Your hyperlink will be sent by e-mail.

Internet/HTML Format

\$599 per year

License agreement and additional terms on back page.

Roth Conversion Analyzer

Call for pricing.

License agreement and additional terms to be provided.

The *Roth Conversion Analyzer* has been developed by MasteryPOINT Financial Technologies, a Newkirk subsidiary, and is provided by MasteryPOINT and MP Advisory Services, LLC, a registered investment advisor.

Microsoft® PowerPoint® Presentation

\$499

Roth Conversions: A Closer Look
PUBLISHING AGREEMENT FOR PRINTED PUBLICATION

Terms:

1. The expected shipping dates for the printed publication provided on the reverse side of this agreement are based on Newkirk's receiving a complete order form. All imprint information must be submitted before the order form is considered to be complete.
2. Account may distribute the publication purchased hereunder for its own business use. It may not reproduce, copy, license, or otherwise transfer any rights to the content contained in the publication without the express written consent of Newkirk.
3. Account agrees to pay all invoices within 30 days or be subject to a late payment fee of 2% a month plus any collection fees incurred by Newkirk, including reasonable attorneys' fees.
4. Newkirk disclaims all warranties in regard to the publication provided hereunder except as to its title thereto and noninfringement of any copyright or trademark. While care has been taken in preparation of the content, no warranty, express or implied, is given with respect to the accuracy of the content. In any event, Newkirk's liability to Account with respect to any content provided under this agreement is strictly limited to the fee paid for the specific publication in question.

Accepted by _____

Accepted by _____

For Newkirk Products, Inc. ("Newkirk")

For _____

Dated _____

Dated _____

Roth Conversions: A Closer Look
INTERNET/HTML FORMAT LICENSING AGREEMENT

Terms:

1. Newkirk hereby grants to Account a non-exclusive license to link to the *Roth Conversions: A Closer Look* Internet/HTML version for the period and pursuant to the terms stated herein.
2. The Account may use the Internet/HTML version for its own purposes only and may not offer it for sale or license it to any other party.
3. Newkirk will provide Account with a hyperlink to the *Roth Conversions: A Closer Look* Internet/HTML version hosted on Newkirk's Internet server, as soon as practicable after the printing of the booklet.
4. This agreement shall be for one year. The right of Account to use any copy provided hereunder shall end immediately upon termination of this agreement.
5. Account shall provide Newkirk with its Internet web page address so that Newkirk may, from time to time, review the use of the Internet/HTML version it is providing under this agreement. Your website address: _____.
6. Newkirk warrants that it owns and/or has the right to license the content appearing in the *Roth Conversions: A Closer Look* booklet. While care has been taken in preparation of the content, no warranty, express or implied, is given with respect to the accuracy of the content. In any event, Newkirk's liability to Account with respect to any content provided under this agreement is strictly limited to the license fee paid for the specific booklet in question.
7. This Agreement will be governed by and construed and enforced in accordance with the laws of the State of New York, without regard to any provision of New York law that would require or permit the application of the substantive law of any other jurisdiction, and any legal action with respect to any such disputes shall be brought in the federal or state courts located in Albany County, New York.

Accepted by _____

Accepted by _____

For Newkirk Products, Inc. ("Newkirk")

For _____

Dated _____

Dated _____