

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 _____ (Specify on reverse side)

Printed SmartSheet Quantity _____ (Specify on reverse side)

Imprint Options Check all that apply.

No Imprint Booklet(s)/SmartSheet(s) **No Imprint PDF(s)**

Custom Imprinted Check all that apply.

- Set type for imprint per attached instructions
- Artwork for imprint on file at Newkirk
- Artwork e-mailed to Newkirk at **jryan@newkirk.com**
- Imprint on booklet front cover only
- Imprint on booklet back cover only
- Imprint on booklet front and back covers
- Imprint on SmartSheet front page only
- Imprint on SmartSheet back page only
- Imprint on SmartSheet front and back pages
- Repeat booklet imprint on PDF(s)
- Repeat SmartSheet imprint on PDF(s)
- Proof requested

Electronic Content

- \$195 per year for access to the PDF (SmartSheet) or HTML per title
- \$1,995 per year for access to the entire series (PDF or HTML)
- Electronic version by title — HTML** or **Entire electronic series — HTML**
(check boxes on reverse side)
- Electronic version by title — PDF** or **Entire electronic series — PDF**
(call for details)

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 518-862-3226** or e-mail jryan@newkirk.com.

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PRINTED BOOKLETS

Custom Imprint Option

- ▶ **Can include logo and special typefaces**
- ▶ **Imprint on front and/or back cover in full color**

Your imprint information is printed in full color. The space available on the front cover is approximately 3" wide x 2³/₈" deep. The space available on the back cover is approximately 3" wide x 7" deep. Please provide your artwork in native files (Quark or InDesign) for text, vector eps files or 300 dpi tiff or jpeg for logo files. Send your artwork by e-mail to Newkirk.

Printed Booklets - Custom and Unimprinted		
Quantity	Custom Imprinted	Unimprinted
200 - 499	\$1.25	\$.95
500 - 999	1.20	.95
1,000 - 2,499	.95	.95
2,500 - 4,999	.85	.95
5,000 - 9,999	.75	.95
10,000 or more	Call for a quote	
One-time set-up fee for imprint typeset by Newkirk: \$85.		
Prices do not include shipping, handling, and applicable sales tax.		
Minimum 50 per title / 200 per order.		

PRINTED SMARTSHEETS

Custom Imprint Option

- ▶ **Can include logo and special typefaces**
- ▶ **Imprint on front and/or back page in full color**

Your imprint information is printed in full color. The space available on the front page is approximately 3⁵/₈" wide x 2³/₄" deep. The space available on the back page is approximately 7¹/₂" wide x 1¹/₄" deep. Please provide your artwork in native files (Quark or InDesign) for text, vector eps files or 300 dpi tiff or jpeg for logo files. Send your artwork by e-mail to Newkirk.

Printed SmartSheets - Custom and Unimprinted		
Quantity	Custom Imprinted	Unimprinted
200 - 499	\$.75	\$.85
500 - 999	.70	.85
1,000 - 2,499	.60	.85
2,500 - 4,999	.55	.85
5,000 - 9,999	.50	.85
10,000 or more	Call for a quote	
One-time set-up fee for imprint typeset by Newkirk: \$85.		
Prices do not include shipping, handling, and applicable sales tax.		
Minimum 50 per title / 200 per order.		

Custom Design

Newkirk can customize your booklets and SmartSheets to the degree you choose. Pricing for customization is based on your requirements. Please call for a quote.

TITLE	PRINTED VERSIONS			ELECTRONIC VERSION	
	BOOKLET	QUANTITY	SMARTSHEET	QUANTITY	HTML VERSION
Retirement Planning with IRAs	WMB1		WMS1		WMSI1 <input type="checkbox"/>
IRA Rollovers: Consolidate Your Assets	WMB2		WMS2		WMSI2 <input type="checkbox"/>
Trust & Investment Services	WMB3		WMS3		WMSI3 <input type="checkbox"/>
Investment Management Accounts	WMB4		WMS4		WMSI4 <input type="checkbox"/>
Investment Custody Accounts	WMB5		WMS5		WMSI5 <input type="checkbox"/>
Why You Need a Will	WMB6		WMS6		WMSI6 <input type="checkbox"/>
Naming Your Executor	WMB7		WMS7		WMSI7 <input type="checkbox"/>
Agent for Executor	WMB8		WMS8		WMSI8 <input type="checkbox"/>
Naming Your Trustee	WMB9		WMS9		WMSI9 <input type="checkbox"/>
Living Trusts	WMB10		WMS10		WMSI10 <input type="checkbox"/>
Testamentary Trusts	WMB11		WMS11		WMSI11 <input type="checkbox"/>
Charitable Lead Trusts	WMB12		WMS12		WMSI12 <input type="checkbox"/>
Charitable Remainder Trusts	WMB13		WMS13		WMSI13 <input type="checkbox"/>
QTIP Trusts	WMB14		WMS14		WMSI14 <input type="checkbox"/>
Two-Trust Estate Plan for Married Couples	WMB15		WMS15		WMSI15 <input type="checkbox"/>
Understanding the Federal Estate Tax	WMB16		WMS16		WMSI16 <input type="checkbox"/>
Making Lifetime Gifts	WMB17		WMS17		WMSI17 <input type="checkbox"/>
Choosing a Retirement Plan	WMB18		WMS18		WMSI18 <input type="checkbox"/>
Mutual Fund Investing	WMB19		WMS19		WMSI19 <input type="checkbox"/>
Understanding Annuities	WMB20		WMS20		WMSI20 <input type="checkbox"/>
Special Needs Trusts	WMB21		WMS21		WMSI21 <input type="checkbox"/>
Passing Along Your Wealth and Values	WMB22		WMS22		WMSI22 <input type="checkbox"/>
Business Succession Planning	WMB23		WMS23		WMSI23 <input type="checkbox"/>
When Retirement Is Near	WMB24		WMS24		WMSI24 <input type="checkbox"/>
Your Retirement Income	WMB25		WMS25		WMSI25 <input type="checkbox"/>
Investing During Retirement	WMB26		WMS26		WMSI26 <input type="checkbox"/>
In-plan Roth Conversion: An Option to Consider	WMB27		WMS27		WMSI27 <input type="checkbox"/>
The Roth IRA: Your Questions, Our Answers	WMB28		WMS28		WMSI28 <input type="checkbox"/>
					All <input type="checkbox"/>
		TOTAL		TOTAL	
					TOTAL

**Wealth Management Series
AGREEMENT FOR PRINTED AND PDF PUBLICATIONS**

Terms:

1. The expected shipping dates for the printed publication 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 and may distribute only to its own clients and prospects. Account may elect to receive the publication(s) electronically as a .pdf file. With either method of delivery, Account may not sell, reproduce, copy, sublicense, or otherwise transfer any rights to the content contained in the publication.
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**Wealth Management Series
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Accepted by _____
For Newkirk Products, Inc. ("Newkirk")
Dated _____

Accepted by _____
For _____
Dated _____