

# Trusts & Estates

## 2009 Online Wealth Management Resource Guide

### Online Advertising Opportunities...

#### Step 1 of 6: Select listing type

#### Basic Listing — \$200

Company page includes:

- Company name, address, phone, toll-free phone, fax, static e-mail and Web URL, and a single contact name
- List of categories

#### Premium Listing — \$400

Company page includes:

- Company name, address, phone, toll-free phone, fax, live e-mail and Web URL links, and a single contact name
- Logo
- 50-Word Company Description
- List of categories

#### Platinum Listing — \$600

Company page includes:

- Company name, address, phone, toll-free phone, fax, live e-mail and Web URL links, and a single contact name
- Logo
- 100-Word Company Description
- Up to 5 separate live links to other pages on your website
- List of categories

Search results page:

- Featured Supplier designation in all search results\*  
\*one of the first companies viewers see when browsing the directory by showing up at the top of your product category with your company logo and designation as a featured supplier.

#### Trust Institutions Basic — \$200

Company page includes:

- Company name, address, phone, toll-free phone, fax, static e-mail, and Web URL

#### Trust Institutions Premium — \$250

Company page includes:

- Company name, address, phone, toll-free phone, fax, static e-mail, and Web URL
- Total discretionary, total non-discretionary, and total trust assets
- 10 key personnel

#### Check One:

- Basic Listing @ \$200/year  
 Premium Listing @ \$400/year  
 Platinum Listing @ \$600/year  
 Trust Institutions Basic @ \$200/year  
 Trust Institutions Premium @ \$250/year

**Questions? Contact Adam Strominger at 212-204-4249; or e-mail Adam.Strominger@penton.com.**

#### Step 2 of 6: Sign & complete authorization

#### Insertion Order/Authorization

**YES**, include my company's listing(s) in the *2009 Online Wealth Management Resource Guide*. I have indicated my listing options above.

**Authorized Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Ordered by:

Name \_\_\_\_\_ Title \_\_\_\_\_

Company & Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_ Fax\* \_\_\_\_\_

E-mail\*\* \_\_\_\_\_

\*Your fax number is used to communicate with you. By providing your fax number, you are giving written permission to receive listing and other related information from *Trusts & Estates* that may be of interest to you by fax. We will not share this information or use it for any other purpose. You may opt-out of receiving faxes from us at any time in the future. \*\*Required for sending future listing information.

**TOTAL=** \$ \_\_\_\_\_

from listing options chosen

#### Payment Options:

Bill me at the above address

Look for my check made payable to Penton Media sent to: Penton Media, Inc., Attn: Shalan Mill, Wealth Management Resource Guide, 9800 Metcalf Ave., Overland Park, KS 66212

Charge my  Visa  MC  Amex

Name on Card \_\_\_\_\_ Card# \_\_\_\_\_ Exp. \_\_\_\_ / \_\_\_\_

**Fax all completed forms to 913.514.9221 or e-mail completed PDF adam.strominger@penton.com. Send artwork to Melissa Abbott Mudd at melissa.abbottmudd@penton.com. See next page for specifications and acceptable formats.**

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## 2009 Online Wealth Management Resource Guide

### Step 3 of 6: Complete basic listing information

#### Basic Listing Information (All companies should fill out)

##### Company Information (for online)

Company/Division: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web Site URL: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Toll-Free Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

### Step 4 of 6: Select appropriate categories.

#### Product Categories (All companies should fill out)

**Banks and Financial Institutions, please be sure to select the Trust Institutions category ONLY.**

##### Product and Services Categories

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> 1031 Exchanges (0100)                                 | <input type="checkbox"/> Estates (0215)  | <input type="checkbox"/> Oil & Gas Acquisition & Development (0315) |
| <input type="checkbox"/> Annuities (0105)                                      | <input type="checkbox"/> Executive Search Firms/Recruiters (0040)              | <input type="checkbox"/> Oil & Gas Asset Management Services (0190) |
| <input type="checkbox"/> Appraisers (Business Valuation) (0065)                | <input type="checkbox"/> Family Office Consulting (0185)                       | <input type="checkbox"/> Oil & Gas Exploration & Production (0320)  |
| <input type="checkbox"/> Appraisers (Gems & Jewelry) (0080)                    | <input type="checkbox"/> Farm & Ranch Management (0275)                        | <input type="checkbox"/> Oil & Gas Properties (0305)                |
| <input type="checkbox"/> Appraisers (Machinery & Technical Specialties) (0085) | <input type="checkbox"/> Financial Planners (0075)                             | <input type="checkbox"/> Operations or Processing Services (0265)   |
| <input type="checkbox"/> Appraisers (Personal Property) (0090)                 | <input type="checkbox"/> Genealogical Search Services (0045)                   | <input type="checkbox"/> Philanthropic Advisors (0120)              |
| <input type="checkbox"/> Appraisers (Real Property) (0095)                     | <input type="checkbox"/> Industry Associations (0050)                          | <input type="checkbox"/> Private Foundation Management (0175)       |
| <input type="checkbox"/> Auction Houses (0005)                                 | <input type="checkbox"/> Industry Certification (0125)                         | <input type="checkbox"/> Private Placement Life Insurance (0155)    |
| <input type="checkbox"/> Charitable Organizations (0010)                       | <input type="checkbox"/> Insurance Advisors (0260)                             | <input type="checkbox"/> Publications & Research (0270)             |
| <input type="checkbox"/> Coin, Stamp & Art Dealers (0015)                      | <input type="checkbox"/> Insurance Brokers (0205)                              | <input type="checkbox"/> Real Estate Services (0060)                |
| <input type="checkbox"/> Commercial Property Management (0110)                 | <input type="checkbox"/> Insurance Companies (0130)                            | <input type="checkbox"/> Relocation & Home Management (0210)        |
| <input type="checkbox"/> Competitive Intelligence/Analysis (0255)              | <input type="checkbox"/> Insurance Consultants (0220)                          | <input type="checkbox"/> Retirement Services (0160)                 |
| <input type="checkbox"/> Computer Service & Technology Providers (0020)        | <input type="checkbox"/> Investment Advisors (0135)                            | <input type="checkbox"/> RIAs (0165)                                |
| <input type="checkbox"/> Computer Software (0290)                              | <input type="checkbox"/> Investment Banks (0140)                               | <input type="checkbox"/> Tax Services (0170)                        |
| <input type="checkbox"/> Continuing Education Providers (0025)                 | <input type="checkbox"/> Investment Products/Services/Premium Financing (0055) | <input type="checkbox"/> Trust Accounting (0240)                    |
| <input type="checkbox"/> Custody Services (0030)                               | <input type="checkbox"/> Life Settlement (0145)                                | <input type="checkbox"/> Trust Administration (0195)                |
| <input type="checkbox"/> Disability Long-Term Care (0115)                      | <input type="checkbox"/> Managed Futures Specialist (0245)                     | <input type="checkbox"/> Trust Administration Services (0180)       |
| <input type="checkbox"/> Elder Care Services (0035)                            | <input type="checkbox"/> Market Research (0250)                                | <input type="checkbox"/> Trust Services (Non-Custodial) (0230)      |
| <input type="checkbox"/> Energy Sector Specialists (0310)                      | <input type="checkbox"/> Marketing & Communications (0070)                     | <input type="checkbox"/> Trust-Owned Life Insurance (0200)          |
| <input type="checkbox"/> Estate Valuations (0225)                              | <input type="checkbox"/> Master Limited Partnerships (MLPs) (0300)             | <b>Trust Institutions</b>   |
|  | <input type="checkbox"/> Mutual Funds (0150)                                   | <input type="checkbox"/> Trust Institutions (0285)                  |

### Step 5 of 6: Assets & key personnel

(Only Trust Institutions ordering the Trust Institutions Premium should fill out)

Please list your asset information below

Total Discretionary Assets: \$ \_\_\_\_\_

Total Non-Discretionary Assets: \$ \_\_\_\_\_

Total Trust Assets: \$ \_\_\_\_\_

Key Personnel (Provide name and title for up to 10 contacts below)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

### Step 6 of 6: Live links

(Only companies ordering the Platinum Listing should fill out)

Please list your 5 separate live links below

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

#### MATERIALS INSTRUCTIONS:

(If your listing includes a logo or featured supplier)

E-mail company descriptions (Microsoft Word document) and online logos (.jpg, .gif, .eps, or .tif format) to Melissa Abbott Mudd at [Melissa.AbbottMudd@penton.com](mailto:Melissa.AbbottMudd@penton.com)

#### QUESTIONS?

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