

IUL Marketing Services Agreement

Step 1: Company Information	Company:	Contact Name:																																										
	Address:																																											
	Office Phone:	Contact Cell:																																										
	Web Address:	Contact Email:																																										
Step 2: Define Your Service Area	<p>Please list the general geographic area that you service (ie, Dallas, Fort Smith Arkansas, Ft. Meyers FL, etc.):</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div> <p><small>Note: Because we use broadcast media to generate leads, leads will come in from the entire broadcast area of your market. If multiple agents are receiving leads at the same time, we will divide the area by Zip Codes.</small></p>																																											
Step 3: Number of Leads & Total Purchase Price	<p>Circle/Indicate Your Choice: Please ask an MYM representative if pricing for your market is standard or preferred</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>Number of Leads</th> <th>Price Per Lead</th> <th>Free "Replacement" Leads</th> <th>Total Leads¹</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Standard</td> <td>50</td> <td>\$109</td> <td>5</td> <td>55</td> <td>\$5,450</td> </tr> <tr> <td>Preferred</td> <td>50</td> <td>\$99</td> <td>5</td> <td>55</td> <td>\$4,950</td> </tr> <tr> <td>Standard</td> <td>100</td> <td>\$99</td> <td>10</td> <td>110</td> <td>\$9,950</td> </tr> <tr> <td>Preferred</td> <td>100</td> <td>\$89</td> <td>10</td> <td>110</td> <td>\$8,950</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 50%;">Amount Due For Order</td> <td style="width: 10%; text-align: right;">\$4,950</td> <td rowspan="5" style="width: 40%; vertical-align: top; padding: 5px;"> <p>If more leads are generated during the campaign than you ordered, would you like to buy them for \$50 each?</p> <p><input type="checkbox"/> Yes – All You Have</p> <p><input type="checkbox"/> Yes – Specific Number: _____</p> <p><input type="checkbox"/> No</p> <p><small>(to be charged at test conclusion)</small></p> </td> </tr> <tr> <td>Startup Package (50 DVDs, custom website & URL)</td> <td style="text-align: right;">\$495</td> </tr> <tr> <td>Additional DVDs: Quantity _____ @ \$9.95 each:</td> <td></td> </tr> <tr> <td>Discounts, if any:</td> <td style="text-align: right;"><\$XXX></td> </tr> <tr> <td>Total Due Now:</td> <td></td> </tr> </table> <p><small>¹ All orders will receive 1 free "replacement" lead for each 10 purchased; see "Replacement Leads" below for details.</small></p> <p>NOTES:</p>				Number of Leads	Price Per Lead	Free "Replacement" Leads	Total Leads ¹	Total Price	Standard	50	\$109	5	55	\$5,450	Preferred	50	\$99	5	55	\$4,950	Standard	100	\$99	10	110	\$9,950	Preferred	100	\$89	10	110	\$8,950	Amount Due For Order	\$4,950	<p>If more leads are generated during the campaign than you ordered, would you like to buy them for \$50 each?</p> <p><input type="checkbox"/> Yes – All You Have</p> <p><input type="checkbox"/> Yes – Specific Number: _____</p> <p><input type="checkbox"/> No</p> <p><small>(to be charged at test conclusion)</small></p>	Startup Package (50 DVDs, custom website & URL)	\$495	Additional DVDs: Quantity _____ @ \$9.95 each:		Discounts, if any:	<\$XXX>	Total Due Now:	
	Number of Leads	Price Per Lead	Free "Replacement" Leads	Total Leads ¹	Total Price																																							
Standard	50	\$109	5	55	\$5,450																																							
Preferred	50	\$99	5	55	\$4,950																																							
Standard	100	\$99	10	110	\$9,950																																							
Preferred	100	\$89	10	110	\$8,950																																							
Amount Due For Order	\$4,950	<p>If more leads are generated during the campaign than you ordered, would you like to buy them for \$50 each?</p> <p><input type="checkbox"/> Yes – All You Have</p> <p><input type="checkbox"/> Yes – Specific Number: _____</p> <p><input type="checkbox"/> No</p> <p><small>(to be charged at test conclusion)</small></p>																																										
Startup Package (50 DVDs, custom website & URL)	\$495																																											
Additional DVDs: Quantity _____ @ \$9.95 each:																																												
Discounts, if any:	<\$XXX>																																											
Total Due Now:																																												
Step 5: Agree To Terms	<p>Please sign your name & date here to show that you have read and agree to all terms of service:</p> <p style="text-align: center;">X _____ / Date _____</p>																																											

Step 6: Billing Information (Note: this credit card info will be used for future orders, per this agreement)

Card Number:		Card Type:	
Exp. Date:		Security Code:	
Name on Card:		Signature:	

Please Fax All 5 Pages To: (817) 796-1219

(Include this form, 3 pages of Services Terms & Conditions, and DVD customization form.)

MONOPOLIZE YOUR MARKETPLACE

IUL Marketing Services Terms & Conditions

Monopolize Your Marketplace (hereafter, MYM) agrees to offer marketing services to client listed on Services Order Form (hereafter, Client) as follows:

Overview Of Program: MYM offers lead services for sellers of Indexed Universal Life (IUL) products (Clients) on a fixed-cost-per lead basis, as well as other marketing services designed to aid in conversion of leads into sales, including, but not limited to customized DVDs and online videos, custom websites, follow up email systems, customized printed brochures, and so forth. MYM uses local and national media including radio, television, newspapers, magazines, direct mail, etc. to generate said leads. Radio is the primary lead generating source.

- **Pricing:** MYM sells leads and other marketing services to Clients at the prices listed below. Pricing is current as of the date that this agreement was issued; please check www.IndexedLeads.com for current pricing.
 - **Leads: Standard Price \$109.00;** Prices may be lower depending on quantity purchased and if a market is considered a “preferred” market. See www.indexedleads.com for latest pricing.
 - Customized IUL Video: \$99 one-time fee (however, may only be used while Client is active with MYM)
 - Customized DVDs: \$9.95 each plus shipping; discounts may be available for contract pricing and/or quantity purchases.
 - Custom Website (to showcase the video): \$195 Includes URL; (may only be used while Client is active with MYM)
 - Emails for follow up: no charge
 - Sales tax is charged for TX Clients only, and only for printed materials (DVDs, brochures, etc.)
 - **Fast Start Package (required):** MYM will make a “Fast Start” package available to new Clients at a reduced price. The Fast Start Package is required for all new Clients, and includes a customized IUL video, a customized website & URL, follow up emails, and 50 professional copies of the customized IUL DVD. All future DVD purchases are NOT included with lead purchases, and must be made separately according to the then-current DVD price list. The Fast Start Package will be made available for \$495 to new Clients (value \$791.50 if purchased separately).
- **Exclusivity:** All leads are guaranteed to be 100% exclusive—i.e. any single lead will not be sold to more than one Client.
- **Timing:** MYM normally requires 3 weeks from the time a first order is placed to begin advertising to provide time for the Fast Start package to be completed. Re-orders normally require 2 weeks’ notice. Once an advertising run has started, they generally are completed within 1 to 2 weeks.
- **Territory:** Client shall declare on Page 1 of this Agreement the Metropolitan area he/she wishes to service. In the event that MYM has more than one Client in an area, MYM shall at its sole discretion assign various ZIP codes to various Clients. MYM may reduce the number of ZIP codes serviced by any given Client at any time at its sole discretion. In the event that more leads are being generated in a single ZIP code that can be handled by one Client, MYM may assign leads to more than one Client per zip code, although individual leads would still be 100% exclusive, per above.

Lead Counting: For purposes of this agreement, a lead is counted as follows: Any prospect that gives full contact information to MYM’s call center representative, including full name, address and phone number is counted as an official lead. Email addresses are not required to be counted as a lead. **Any lead that does NOT include a phone number WILL NOT be counted as a lead.** Please note that Client may still receive email notifications of prospects who did not give a phone number. These will not be counted against Client’s lead total.

Preferred Markets: Some markets may qualify for “Preferred” pricing, which is \$10 less per lead than “Standard” pricing. This distinction is reserved for markets where, based on experience and market conditions, MYM’s cost to generate leads is less than normal markets. Each market’s status (standard or preferred) is listed on IndexedLeads.com and is subject to change without notice at any time. Since the status of market can fluctuate, Clients should check the website or speak to an MYM representative to find the status of a given market prior to placing any order.

Replacement Leads Policy: Client may, from time to time, receive leads that are deemed to be “bad” leads. These would include any leads from competitive financial and/or insurance sales people, leads from advertising sales people, and other non-actionable prospects. Bad Leads specifically do not include leads received from prospects that are not financially qualified to purchase IUL products, those who simply lack interest, those who are too old or too young to qualify, those who cannot qualify for IUL for health reasons, those who do not respond to follow-up attempts, etc. To compensate for “bad leads,” MYM will automatically give Client one

(1) FREE REPLACEMENT LEAD for every ten (10) leads that are purchased. In other words, Client will receive 55 leads for every 50 leads purchased, etc. No other "bad lead" remedies will be offered or available to Client.

Geographic Proximity: MYM only places advertising on behalf of clients who have purchased leads; therefore, any leads that result from a given campaign shall be billable to Client, even those that fall outside of Client's normal geographic service range, with the following exceptions: 1) Any lead that is more than 200 miles from Client's office (address listed on this form), 2) Any lead that is less than 200 miles from Client's office, but is NOT in a state in which Client is not licensed.

Lead Handling: All leads that are generated will be directed to call a toll-free number to request a DVD and routed to a call center managed by MYM. The call center shall be paid for at MYM's sole expense. Leads will be asked basic contact information plus several additional questions regarding their financial/retirement situation. All Leads will be sent via email to Client within several minutes of being captured. Client will then be responsible for contacting leads and offering to deliver or mail a hard copy of the DVD. All money spent to deliver DVDs to Leads shall be at Client's sole expense. Leads will be directed to watch the video presentation online at an online site customized and made available by MYM as part of the Fast Start package. Closing leads into customers is Client's sole responsibility.

Intellectual Property & Licensure: Client hereby acknowledges and agrees that the copyrighted intellectual property contained within this program, including but not limited to the advertisements, DVD/video content, websites, brochures, emails, and so forth is the sole property of MYM and is being used under license by signing this agreement. Client may only use said materials while actively engaged and paying MYM for leads as described elsewhere in this Agreement. Client is specifically prohibited from hosting video/DVD program on any website including their own personal website or any third-party video hosting site (Youtube, etc.) and may not make any copies or facsimiles of the DVDs or packaging for any reason whatsoever, even while actively engaged in the program. Any use of MYM's intellectual property outside of this agreement will be considered theft of intellectual property and will be prosecuted to the fullest extent of the law.

Termination: Client must place new orders for leads every 120 days to avoid termination from the program. In the event of termination, Client may use the remainder of his/her DVD and/or literature inventory as deemed appropriate by Client. Client will not, however, have ongoing use of the website and/or video presentation provided by MYM. Once existing hard copies of Client's customized DVDs have been exhausted, Client will have no further rights to use the DVDs, their content, images, messaging, or illustrations.

WARRANTIES: MYM DISCLAIMS ANY WARRANTY REGARDING THE MARKETING RESULTS OR ANY BENEFIT THE CLIENT MIGHT OBTAIN FROM THEIR PARTICIPATION IN THIS PROGRAM. MYM ALSO DISCLAIMS ANY LIABILITY CLIENT MAY INCUR AS RESULT OF COMPLIANCE ISSUES WITH INSURANCE CARRIERS, BROKER/DEALERS, OR STATE OR FEDERAL REGULATORY BODIES. THERE ARE NO REFUNDS. THIS AGREEMENT CONSTITUTES THE ENTIRE UNDERSTANDING OF THE PARTIES AND SUPERSEDES ALL PRIOR AGREEMENTS, UNDERSTANDINGS, ARRANGEMENTS, PROMISES AND COMMITMENTS, WHETHER WRITTEN OR ORAL, EXPRESS OR IMPLIED, RELATING TO THE SUBJECT MATTER HEREOF, AND ALL SUCH PRIOR AGREEMENTS, UNDERSTANDINGS, ARRANGEMENTS, PROMISES AND COMMITMENTS ARE HEREBY CANCELED AND TERMINATED, EXCEPT THOSE SPECIFICALLY LISTED ON THE OFFICIAL AGREEMENT.

____ (initial) I have filled in and signed the attached Agreement.

____ (initial) I have read and understand the Terms of Service.

____ (initial) I understand there are NO REFUNDS.

Company Name

Date

Authorized Person

Signature

MONOPOLIZE YOUR MARKETPLACE

DVD/Video Customization Information

Please Fill Out This Form And Send With Your Services Agreement

The information you give below will appear on your DVD cover, your custom website, and on the DVD/video itself.

Information Needed	Your Information
Your Name	
Professional Designations	
Company Name	
Address	
Phone Number	
Email Address	
Bio (50 to 100 words)	

Note: Your main/regular website will not be shown on the materials. Instead, MYM will create a custom website that will only have your video presentation and contact information. Prospects can link through to your MAIN website from the MYM website.

Example Bio:

Larry A. Davidson, AAI, CIC

Larry Davidson specializes in helping people reduce risk and minimize their tax burdens during retirement using financial and insurance products from some of the world's largest and most financially stable institutions. He is an graduate of the University of Texas ('93) and currently lives in Southlake, Texas where he served in several community positions, including School Board (Carroll ISD, 2003-2007) and City Council (2008-present), and several volunteer positions in his church. Larry and his wife Janet have 3 children and golden retriever.

Please Fax This Page With Your Services Agreement To: (817) 796-1219