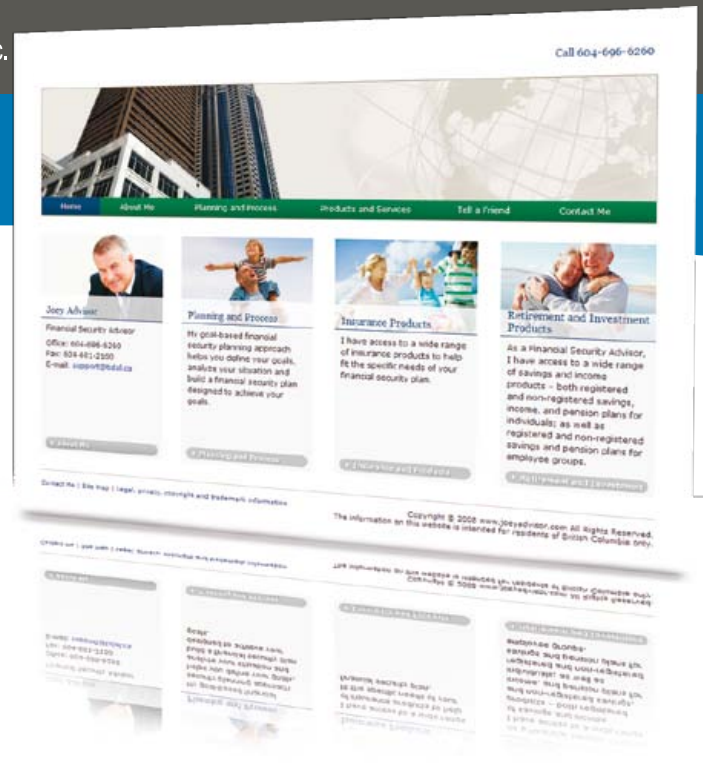




# Personalized websites for Advisors



## Understanding the program

- Specifically designed for Advisors
- A turnkey solution to building an effective website
- Websites developed to be professional and cost effective

## Did you know?

- 81% of Internet users look for information online about a service or product they are thinking of buying\*\*\*
- 93% of households that earn more than \$75,000 annually use the Internet\*\*\*
- 53% of Internet users look up phone numbers or addresses online\*

Source: \*\*\*PEW Internet - www.pewinternet.org/trends.asp

## This is why you need a website!

### Features & benefits

- **Credibility** - establish credibility with clients and prospects.
- **Customizable** - customize to your needs and purposes. Apply your brand to the design.
- **Very affordable**
- **Measurable value** - on a quarterly basis, you'll receive regular updates on how your website is being used.
- **Tell a friend** - the website is great for generating new business. The tell a friend feature allows website visitors to refer your website to friends or family members via e-mail.
- **Quick and easy to set up** - can be up and running in four to six weeks.
- **Customer loyalty** - provide useful links and resources for your clients.
- **Domain name** - use your own domain name (e.g. [www.yourname.com](http://www.yourname.com) or [www.yourbrand.com](http://www.yourbrand.com)).
- **Ongoing maintenance and support** - our support team works directly with you to make any future updates and changes to your website. We have implemented processes in order to obtain the necessary privacy and compliance approvals.
- **Technology management** - our team will manage the required website technology on your behalf.



# Financial advisor website form

## Signup process:

At AdvisorWebsites.com we use a simple, effective five-step process.

- 1 **Submit form:** After a low signup fee, you get 30 days of free service to build your site and work with Compliance.
- 2 **Client meeting:** An AdvisorWebsites.com website specialist will go over the process in more detail and get started.
- 3 **Produce site:** we'll produce the initial site based on your package choice and unique requirements.
- 4 **Compliance approval (if necessary)**
- 5 **Launch site:** launch initial site and perform ongoing updates and maintenance

Attach your business card below:

Attach business card here or provide contact information

**Acknowledgement:** AdvisorWebsites.com by Tidal Multimedia Inc. makes no representations as to the adequacy of the content of your website for any purpose or its compliance with applicable laws. You may wish to discuss the content of your site with your legal advisor.

**Client information:**

Your name: \_\_\_\_\_

What Carriers / Organizations are you affiliated with and what is your affiliation?  
\_\_\_\_\_

Are you operating as an individual advisor or a corporation?  
\_\_\_\_\_

What are the main product lines your business sells?  
\_\_\_\_\_

Does your Compliance department allow you to create websites with external providers?  
\_\_\_\_\_

Do you have a website? If so, what is your domain name/URL?  
\_\_\_\_\_

Are you currently registered to sell mutual funds?  
If so, please state your dealer \_\_\_\_\_

**Fees:**

- **Set-up fee (typically between \$400 – \$800)**
- **Monthly fee (typically between \$62 – \$100 per month)**

Additional custom work may be required at an additional cost, and will be discussed with each client.

**Payment options:**

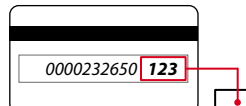
**A. CREDIT CARD**

Name on credit card: \_\_\_\_\_


Credit card number: \_\_\_\_\_

Credit card type: \_\_\_\_\_ Expiration date: \_\_\_\_/\_\_\_\_

*Visa, Mastercard & Discovery (3 digit)*



*American Express (4 digit)*



CVN (the number on the back of your credit card): \_\_\_\_\_

**Billing address for credit card statement**

Street: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**B. CHEQUE**

If you will be paying by cheque, submit a blank cheque, marked "Void" with this form.

Please mail your completed form to the address below or fax it to **604-601-2160**.