



Advisor Products Inc.
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Website Order Form & Agreement

1. Complete order form
2. Sign agreement
3. Fax to 516-706-3162

PRIMARY CONTACT			Sales Representative			Date		
Company Name								
Company Address			BILLING ADDRESS			BILLING CONTACT		
Telephone Number			Fax Number					
Email Address								

I am ordering a new website

I am adding an option to my website

My Broker/Dealer/Custodian/Affiliate(s) is (are): _____

I already own a domain name: _____ I want to use additional domain names for a \$50 setup fee

I want AdvisorSites to register a domain name for me. (Fill in your favorite domain names and your credit card information below). AdvisorSites will register your domain name at no charge. Network Solutions, the company that administers domain names, offers the following registration options and requires your credit card for payment: To learn more visit www.netsol.com

Register my domain for: 1 year \$34.99 2 years \$59.98 3 years \$74.97 5 years \$99.95 10 years \$149.90

Domain Name (1st Choice)

(2nd Choice)

(3rd Choice)

SETUP FEE

- Basic Template Site Development** (includes a pre-designed template banner) - \$250
- Template Site With Custom Banner** (Customized banner--required if you have a logo) - \$500
- Custom Site Development** with customized home page, banner, buttons and formatting throughout - \$4,000
- Custom setup includes the design of four (4) home page compositions and three (3) revisions to one (1) of the four (4) compositions. The setup also includes the design of up to 15 inside pages with two (2) revisions.
 - The 15 pages include 5 pages customizable with your content and 10 pages of Platinum License content. **Platinum License content pages cannot be exchanged for custom content pages.** We will provide quote for additional pages.

ANNUAL LICENSE FEE (See Appendix A)

Cancellation of service prior to contract completion is subject to cancellation penalty (see page four).

Silver License - \$800/yr* **Gold License** \$1,300/yr **Platinum License** \$2,100/yr.

*Silver License is limited to 7 customizable pages. See Appendix A for a full list of license pages details.

**** Please Initial Below ****

Your credit card will automatically be billed the website annual license fee 30 days from receipt of your order for a template website and 120 days for a custom website. _____ Initial

The annual license fee covers 12 months of service, and will begin 60 days from receipt of the order for a template, and 150 days for a custom or when your website goes live, whichever comes first. Renewals will occur automatically on that anniversary date thereafter. _____ Initial

PAYMENT METHOD

MC VISA AMEX

Credit Card Number

Name exactly as it appears on your credit card

Card Expiration: _____ Billing Zip Code: _____

Card Billing Address (if different from above):

Street Suite

City State Zip

X _____

Signature

OPTIONAL ENHANCEMENTS

- EMAIL NEWSLETTERS.** "Push" newsletters with our articles to your clients and prospects. With email newsletters, we put you in control of an easy to use email list server. Regular email updates lure traffic to your site, and keep you in touch with clients by sending them the articles and weekly market reports we provide. Email Newsletters insert the banner from your website at the top of all emails and sends it to all members of your list. A link we place on lets visitors to your site sign up for your email newsletter automatically in seconds. All emails contain an "unsubscribe" button that automatically removes a recipient. **(\$500/yr) (\$300 Setup)**
- ADVISORSITES CONFERENCING.** Host meetings online at a fraction of the cost of Placeware or WebEx. Go over a financial plan or quarterly portfolio report with a client, show prospects a PowerPoint presentation. Secure 128-bit encryption. So easy to use for you and meeting participants that you will not hesitate to host web conferences on the fly. High-speed Internet connection is recommended. Web page where you initiate meeting is branded with your logo and is linked to your website. Host as many online meetings with **up to 5 participants for \$840 a year; up to 10 participants for \$1440. Call for pricing for larger groups. (\$300 set-up fee for all orders)**
- ADVISORSITES COMPLIANCE ENGINE SNAPSHOT (ACES).** Use ACES to archive your site every time it's updated. To be prepared for an SEC audit, you can use ACES to keep a record of your website as it evolves, just like you save samples of all your other marketing materials.. We developed ACES to make the archiving process paperless and painless. In seconds, the application takes a "snapshot" of your entire site and, with the click of a mouse, stores it on a computer in your office. **(Included with Gold and Platinum license)**
- EMAIL ARCHIVING SYSTEM (EAS - GR).** Archive all incoming email and outgoing emails. **(\$2000/yr up to 10 users)(\$1000 Setup) For additional email addresses call for pricing.**
- ADVISORVAULT.** With AdvisorVault you can store documents online accessible to your clients 24/7. Upload your clients' investment policy statements, financial plans, birth certificates, insurance policies, portfolio performance reports and other documents, behind a secure 128-bit encrypted firewall.
\$300 One-Time Setup Fee; \$500/yr for 250mb of storage (250mb Included in Platinum License)
- WRITING SERVICES.** Tap API's team of experienced financial journalists to tell your story, or just get help with writing your website content about your firm and personnel. Our writers and editors have decades of experience in communications about complex personal financial ideas to consumers. 3 Hour Minimum For Writing/Editing.
 - By The Hour (\$250/hr)** **Template Marketing Copy (TMC) (\$350)** **Writing Package 10hrs w/TMC (\$2,600)**
 - Writing Package 15hrs w/TMC (\$3,725)** **Writing Package 20hrs w/TMC (\$4,500)**
- LOGO DEVELOPMENT.** Create a design that can help unify your branding effort and you begin big step toward building your firm's marketing plan. Having your own logo supports a uniform look to all your marketing materials, and conveys a more professional image. You can look as big as the Wall Street giants. We interview you for your preferences, then implement your ideas, coming back with treatments for review and revision. To get a broad creative perspective, you may want compositions from several members of our design team.
 - I want **two** artists to design **two** compositions each. **(\$100/hr, \$1200 Retainer)**
 - I want **three** artists to design **two** compositions each. **(\$100/hr, \$1,500 Retainer)**(Retainers are paid up front; any additional hourly fees are billed at the end of the logo design process.)
Person from your firm (if different from above) authorized to give artists direction: _____
- STOCK OPTIONS AND RESTRICTED STOCK CONTENT & TOOLS PACKAGE.** Show you are serious about attracting wealth management clients with equity compensation, whether they have stock options, restricted stock, performance shares, SARs, or ESPPs in public and pre-IPO companies. Add to your site readable articles, FAQs, and tax guides about these topics, along with fun to use calculators and planning tools. You can "frame" a private-label version of the award-winning MyStockOptions.com for up to 20 clients, with features normally available for a hefty premium membership fee. **(\$600/yr, \$200 Setup Fee) Additional clients above the initial 20 billed at \$25/yr.**
- PORTFOLIO REPORTING.** Web-based reporting packages from a selection of the industry's top names, such as **Lync Consulting LLC** and **Orbitex Advisor Services** (which offers AdvisorSites clients a discount on licensing and setup fees). You get browser-based reporting. **(\$1,400/yr)**
- PASSWORD-PROTECTED PAGES.** Restrict access to pages on your website to staff or clients via login. You manage the users who can access this area. **(One password protected page is included for gold and platinum subscribers. Additional pages: \$100/yr, \$100 setup fee)**

YOUR EMAIL

You will receive five free POP email accounts with your website. Additional accounts can be set up for \$50 a year. After we receive your Website Order Form and Agreement we will send you a website workbook. On page three of the workbook you will find a form that requests the information we need to setup your email accounts. The email accounts will be setup upon return of your workbook. The email accounts can also be set up to forward to an email address that you currently use.

Please Note: To utilize these POP email accounts, you need to be using an Internet Service Provider (ISP) that provides Internet-standard SMTP email services. If you use AOL to dial-up your Internet access, you will not be able to use these accounts. AOL uses a proprietary service that is not compatible with SMTP. Email forwarding to an existing AOL account will work.

I want to use the five email accounts you provide. I will need _____ additional accounts. (\$50/yr per additional account)

ADVISORSHIELD (SPAM BLOCKER & VIRUS PROTECTION) - *Now included in annual maintenance.* Available to Clients using our email service

Stop SPAM before it gets to your computer. AdvisorShield runs on our email server, It's easy to use and offers these great benefits:

- Blocks or tags suspect emails
- No software to install or maintain
- Regain time spent fighting SPAM
- Server based email virus protection

AdvisorShield won't protect against viruses transmitted by diskette or CD, so you'll still need to run anti-virus software on your local PC and network server. However, AdvisorShield gives you front-line protection from email viruses, so known viruses won't even get near your PC.

We've used AdvisorShield ourselves, and more than 70% of email sent to our employees was tagged or blocked without losing any legitimate email!

ADVISORSITES AGREEMENT

THIS AGREEMENT IS MADE 18 May 2007 by and between AdvisorSites, Inc. (hereinafter referred to as "AdvisorSites") and _____ (hereinafter referred to as "Client"), the "Parties". The AdvisorSites Order Form (hereinafter referred to as the "Order Form") is considered an integral part of this agreement.

WHEREAS Client is in need of professional assistance with respect to the development of a website on the Internet; and

WHEREAS ASI is in the business of providing such professional assistance with respect to the development of websites for the financial planning industry;

NOW THEREFORE in consideration of good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged by the parties, it is hereby agreed by and between the parties as follows:

FIRST: It is hereby agreed by and between the Parties that ASI will provide a website for Client. Client further agrees to provide all materials content and decisions required for producing Client website. Client understands that not providing ASI with materials content and decisions required for producing the Client website will not affect the date the License Package fee becomes payable as hereafter provided. ASI agrees that all materials and other information provided by Client to ASI in connection with the development of the website, other than the materials and information that become part of the public portion of the website, are to be kept confidential will not be disclosed to third parties.

SECOND: Client agrees to pay ASI upon signing this agreement the one-time setup fee in the sum as identified alongside the selected Setup Package on the Order Form, plus the annual fee for the License Package selected by Client. Client agrees that the License fee will be payable one month (four months for Custom setup) from the date of this Agreement. Client agrees that If no setup fee is being charged the License fee will be payable upon signing of this agreement. Custom Setup is Conditional on the Platinum License being in force during the two years immediately following the Commencement Date as defined hereafter. Template Setup is Conditional on one of the Licenses being in force during the two years immediately following the Commencement Date as defined hereafter. It is agreed by and between the parties that the period covered by the annual License Package fee is deemed to commence one month (four months for Custom) after the date of signing this Agreement (hereinafter termed the "Commencement Date") extending for a period of one year. Client agrees that creating additional graphics requires additional fees, as does adding additional content services and logo development services pursuant to the Order Form. Client agrees to pay ASI the prevailing website maintenance hourly rate for any additional work requested by the Client that is not included in the website setup including but not limited to adding or formatting of pages of content, training Client personnel, photo scanning and touchup or graphics creation. ASI acknowledges that setup fee includes one (1) half-hour backoffice training session.

THIRD: ASI agrees that the annual License fee covers Client website and email hosting and customer service hours as listed hereafter: Silver license includes one-half (1/2) hour per year, Gold license includes two (2) hours per year, Platinum license includes eight (8) hours per year. Client acknowledges the fact that the annual License fee does not cover any customized changes to the website when made by ASI at the request of Client. Furthermore Client acknowledges and agrees that customer service and technical service requests will be billed at the prevailing rate (currently \$150/hr) in 30- minute increments, with a 30-minute minimum charge per request and that Client will be billed for technical support for website and email service at the prevailing rate unless the reported problem is deemed to be caused by a malfunction or misconfiguration in the computer systems that ASI owns and administers. The definition of a customer service request includes but is not limited to requests for modifications to the Client website (graphics, content, programming), training, email setup, changes to DNS settings.

FOURTH: The annual License fee is for a term of one year. Renewal of this Agreement and License shall occur annually on the Commencement Date and be at the price, terms and conditions in effect at that time. Client or ASI may terminate the License only on or after the second anniversary of the Commencement Date and must do so by giving the other party no less than 30 days advance written notice of such intention. ASI reserves the right, at its option, to deactivate the Client website if any amount due to ASI is not paid within 30 days of invoicing. Client understands that deactivation of the website does not remove the obligation to pay to ASI any sums properly due hereunder, whether or not invoiced. Further, deactivation of the Client website by ASI will not be a course of action against ASI for any damages, compensation, loss, costs or expenses howsoever arising.

FIFTH: Client acknowledges that a \$500 fee shall apply on custom site orders canceled within 21 days of signing this agreement and a \$1,500 cancellation fee shall apply thereafter. A cancellation fee of \$250 shall apply on template site orders canceled within the 24 month contract; \$500 after custom banner is created. If cancellation fee is not paid within 30 days of cancellation then the full amount of the two (2) year contract will be due.

SIXTH: Client acknowledges that neither ASI nor any principal or employee thereof is an attorney or compliance officer and that neither ASI nor any principal or employee thereof has or shall provide any legal, regulatory, compliance advice to Client whether professional or otherwise. Client accepts responsibility for all legal, regulatory, and compliance-related issues arising out of the Client website and agrees to hold ASI and all of its principals and employees and any related entities harmless and free of liability from any economic damages or financial losses arising from any legal or compliance-related issue(s).

SEVENTH: The Parties agree to exercise reasonable due care to be certain that any content provided by the other party will not be used in a manner deemed to be unauthorized by the other party. Content produced by a Party may not be reproduced without the express written consent of that Party. Without limiting the generality of the foregoing, unauthorized use will be deemed to include any infringement of copyright as well as any unlawful use of intellectual property rights.

EIGHTH: Client acknowledges and agrees that: ASI services and ASI software are provided on an "as is" basis, and client's use of the ASI services and ASI software are at client's own risk; ASI does not make, and hereby disclaims, any and all other express and/or implied warranties, including, but not limited to, warranties of merchantability, fitness for a particular purpose, non infringement and title; ASI does not warrant that the services or software will be uninterrupted, error-free, or completely secure; Website, email and other application services including but not limited to account aggregation, portfolio reporting and financial planning are dependent on third-party Internet services providers (ISP's) and application service providers (ASP's), ASI disclaims any and all liability for interruption or malfunction of services due to system failures or malfunctions in third-party provider's systems. Client agrees to hold harmless and free of any liability ASI and all its principals, employees and related entities from any economic damages or financial loss arising as direct or indirect result of the Client website and other ASI services provided under this agreement except where there has been intentional malfeasance or negligence on the part of ASI. In no case shall ASI liability for any or all damages arising from this agreement exceed one quarter of the current year's annual license fees collected from client.

NINTH: If the event Client licenses the ASI proprietary Email Newsletter Services (hereinafter referred to as "ENS"), Client agrees to pay ASI upon signing this Agreement a one-time setup fee plus the ENS annual fee as advised. Client agrees that the setup fee covers the one-time setup by ASI of up to 1000 email addresses, and that Client can add additional email addresses using the ASI Back Office up to a maximum of 1,000 addresses. Client agrees that the ENS annual maintenance fee is for a term of one year commencing with the beginning of the annual License fee. Renewal shall be at the price, terms and conditions then in effect at the time of renewal. ASI covenants with the Client never purposefully to use or disclose the contents of the Clients email list. Client agrees not to use the ENS list server in a manner that would be considered "spamming." The definition of "spamming" includes sending email to individuals who have not expressed an interest in the services of Client, sending emails advertising products or services unrelated to Client's financial services business, or sending an excessive number of emails to the list's subscribers. ASI reserves the right to suspend ENS for a Client that uses ENS for spamming.

TENTH: Failure of either party to object to or take other action with respect to any conduct of the other party that may be in breach of this Agreement shall not be deemed a waiver of either breach or any future breach or wrongful conduct.

ELEVENTH: If any provision of this Agreement or its application to any person or circumstances is found to be invalid or unenforceable, the remainder of this Agreement or the application of that provision to other persons or circumstances shall not be affected and shall remain in full force and effect.

TWELFTH: The validity, interpretation and performance of this Agreement shall be governed by and construed under the laws of the State of New York and shall be deemed by the parties to be a New York contract. The sites of any litigation, which may develop or transpire under the terms and provisions of this Agreement shall be within the State of New York.

LASTLY: This Agreement contains the entire understanding of the parties. Any oral understandings are incorporated and merged in this Agreement. No representations were made or relied upon by either party except as set forth. This Agreement may not be changed unless both AdvisorSites and Client agree to the change in writing.

Agreed To By:

AdvisorSites, Inc.

Client

Date

APPENDIX A

	Silver	Gold	Platinum
Website Hosting	✓	✓	✓
BackOffice	✓	✓	✓
Five POP Email Accounts	✓	✓	✓
Stock/Mutual Fund Quotes & Charts	✓	✓	✓
Market Indices & Top Market News	✓	✓	✓
Corporate Profile	✓	✓	✓
Portfolio Track		✓	✓
Market News/ Stock News			✓
Business News/ US News/ International News			✓
Financial Calculators	✓	✓	✓
Financial Briefs	1	8	Unlimited
Market Data Bank		✓	✓
Featured News			Unlimited
Articles of Interest			30
Quarterly Market Summary			✓
Quarterly Market Update			✓
Home Page	✓	✓	✓
Services Page	✓	✓	✓
Bio Page	✓	✓	✓
Client Update Page	✓	✓	✓
Client Forms Page	✓	✓	✓
Disclosure Page	✓	✓	✓
Web Resources Page	✓	✓	✓
AdvisorShield	✓	✓	✓
Additional Pages	Not Available	✓	✓
Website Archiving	Not Available	✓	✓
Advisor Vault	Add'l \$500/yr	Add'l \$500/yr	✓
Annual Maintenance/Support	30 minutes	2 Hours	8 Hours