

## INSERTION ORDER/AUTHORIZATION

**YES**, include my company's listing(s) in the 2008 Wealth Management Resource Guide. I have indicated my listing options as follows.

### Authorized Signature/Date

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Ordered by:

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_ Country \_\_\_\_\_

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

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

\*Your fax number is used to communicate to 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\*** \$ \_\_\_\_\_

*\*Total of listing options. Minus early bird discount (if applicable). See information to the right.*

### Payment Options:

Bill me at the address above

Look for my check made payable to Penton Media sent to: Penton Media, Inc., Attn: Evalyn Morton, The Penton Media Bldg, 1300 E. 9th St., Cleveland, OH 44114

OR...

Charge my  Visa  MC  Amex

Name on Card \_\_\_\_\_

Card# \_\_\_\_\_

Exp. \_\_\_\_\_ / \_\_\_\_\_

### How to Submit Your Listing Info:

- Complete your order form
- Fill out the information for those options you have purchased on the following pages
- Fax your completed forms back to **913-514-9221**
- E-mail print and/or online logos and mini ads in pc format (.eps or .tif) with a resolution of at least 300 dpi and company descriptions in Microsoft Word to **Cristine Hoffmann at [choffmann@penton.com](mailto:choffmann@penton.com)**.

# Trusts & Estates

## 2008 Wealth Management Resource Guide

(Formerly the Trust Institutions Directory)

In December, the editors of *Trusts & Estates* will publish their 47th annual Wealth Management Resource Guide — the industry's **only** one-stop source of trust institutions for estate planners and advisors. Readers who turn to *Trusts & Estates* each month for advice on servicing high net worth individuals, families and institutions use this annual guide as the indispensable authority on evaluating trust institutions nationwide. In fact, according to a recent survey, 89% of wealth management professionals said they were familiar with the guide and 42% claimed they use it to identify and locate trust institution headquarters, branches, web sites, key contacts and types of assets.

It's the most comprehensive annual reference tool of its kind, providing the latest information not only on trust institutions, but also on related products and services — including charitable organizations, computer software vendors and appraisers.

If your company has multiple offices you would like to list, please e-mail [Adam.Strominger@penton.com](mailto:Adam.Strominger@penton.com) to receive a special listing form.

### Dates & Deadlines:

- Early bird discount:

**Take 10% off your total if we receive your order by September 28, 2007.**

- Final deadline for listing orders and materials:

**October 12, 2007**

(No changes or cancellations accepted after this date)

- Questions?

**Contact Adam Strominger at 212-204-4249; [Adam.Strominger@penton.com](mailto:Adam.Strominger@penton.com).**

### Select Your Print Listing Options: (Cont. next page)

- Print Basic Package—\$95. Must be purchased to be in the print edition.** Includes Company Name, Address, Phone, Toll-free Phone, Fax, E-mail, Web URL and a single contact.
- Print Preferred Package—\$80 additional.** Includes all the information in the Basic Package PLUS your company logo and a boldface listing.

**Options Continued on next page...**

Check here if you do not wish to receive future unsolicited fax advertisements at the fax number shown on the top of this page. Fax back your removal request to 866-364-8597 or phone us at 866-271-1964 and enter your number as prompted. To be removed online, go to [removefax.net](http://removefax.net) and enter your fax number at the top of this page. You may also send an email to [fax-opt-out@penton.com](mailto:fax-opt-out@penton.com). Please include your name and the fax number to be removed from the list. Our failure to comply with your removal request within the shortest reasonable time, as determined by the FCC, with such a valid request identifying the telephone facsimile machine(s) to which the request relates would be unlawful.

**Select Your Print Listing Options (Continued):**

- Print Company Description—\$50 additional.**  
Include a 50-word company description with your listing.
- Print Enhanced Listing—\$50 additional.**  
Include your company's total discretionary, total non-discretionary and total trust assets along with 10 key personnel with your listing. Trust Institutions only.
- Print Mini Ad—\$600 additional.**  
Include a 2-1/8" x 1" ad with your listing and receive a 6-time 1" ad throughout the year in the magazine.
- Print Gold Package—\$4,655 additional.**  
Includes all items in the Print Preferred Package PLUS a 50-word company description and a 1/2-page display ad.
- Print Silver Package—\$2,755 additional.**  
Includes all items in the Print Preferred Package PLUS a 50-word company description and a 1/4-page display ad.

**Select Your Online Listing Options:**

- Online Basic Package—\$200. Must be purchased to be in the online edition.** Includes Company Name, Address, Phone, Toll-free Phone, Fax, E-mail, Web URL, a single contact and company logo.
- Online Company Description—\$50 additional.**  
Include a 50-word company description with your listing.
- Online Landing Page Links—\$50 additional.**  
Add 5 specific urls to anywhere in your website to your online listing.
- Online Enhanced Listing—\$50 additional.**  
Include your company's total discretionary, total non-discretionary and total trust assets along with 10 key personnel with your online listing. Trust Institutions only.
- Online Featured Supplier Listing—\$150 each additional.** Be 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.

<b>1. Sub-total of all options</b> (this page and previous:)	\$ _____
<b>2. Early Bird Discount</b> (if applicable) 10% off	- \$ _____
<b>3. Grand Total</b> (Enter this amount previous page under authorization info)	\$ _____

**Return with all pages by fax to 913-514-9221**

# Trusts & Estates

**SAMPLE PRINT AND ONLINE LISTINGS:**



PRIVATE CLIENT GROUP

**National City**

**National City Private Client Group, Pennsylvania**  
66 East State St (16146)  
Phone: 724-982-1125; 800-622-7815  
Fax: 724-981-3619  
PCG@nationalcity.com  
Steve English  
http://www.nationalcity.com/wealth  
Total Assets: \$146 billion  
Trust Dept. Personnel:  
Steve English, SVP, Market Executive

**Example: Preferred Listing Plus Enhanced Listing**

- Increased visibility and brand recognition with institution logo
- Additional valuable information regarding your institution's assets and key personnel

*(Note: print sample only. Images not to scale.)*  
**This is a typical trust institution listing**



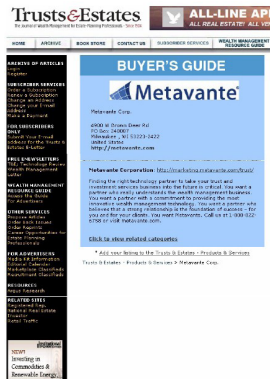
**PACIFIC LIFE**  
**PACIFIC LIFE - SOUTHEAST REGIONAL LIFE OFFICE**  
5 Concourse Pkwy NE Ste 2800  
Atlanta, GA 30328  
Phone: 770-395-1900; 877-903-0019  
Fax: 770-395-1947  
Irene.Hardin@pacificlife.com  
www.pacificlife.com

Pacific Life's Southeast Regional Insurance Offices provides support in case design, point-of-sale, advanced concepts and new business for Georgia, Alabama and Mississippi producers.

**Example: Preferred Listing Plus Company Description**

- Increased visibility and brand recognition with company logo
- 50-word company profile allows you to sell potential customers on your company and/or product

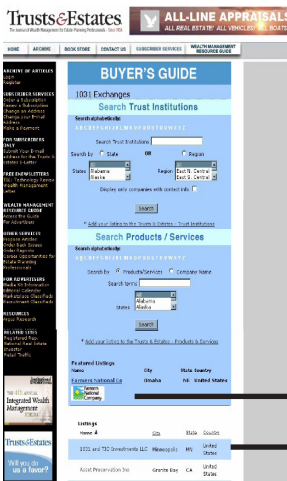
*(Note: print sample only. Images not to scale.)*  
**This is a typical products/services listing**



**Example: Basic Listing Plus Company Description Online**

- Increased visibility and brand recognition with company logo
- 50-word company profile allows you to sell potential customers on your company and/or product

*(Note: screen shot only. Images not to scale.)*



**Example: Online Featured Supplier Listing**

- Top placement in the product category of your choice
- Designation as a Featured Supplier
- Be one of the first companies visitors see when browsing online

*(Note: screen shot only. Images not to scale.)*

→ **Featured Supplier**

→ **Basic Listing**

## BASIC LISTING INFORMATION: (All companies should fill out)

### COMPANY INFORMATION (FOR PUBLICATION)

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

E-Mail \_\_\_\_\_ Web Site URL \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Phone \_\_\_\_\_ Toll-Free Phone (if different) \_\_\_\_\_ Fax \_\_\_\_\_

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

## PRODUCT CATEGORIES: (All companies should fill out)

Please select up to 5 categories as part of your basic listing. Banks and Financial Institutions, please be sure to select the Trust Institutions category. Please note, we will only key in the first 5 categories selected.

### Product and Services Categories

- |   |  |
|---|--|
| <input type="checkbox"/> 6149 1031 Exchanges                                  | <input type="checkbox"/> 6155 Insurance Companies                            |
| <input type="checkbox"/> 6150 Annuities                                       | <input type="checkbox"/> 6173 Insurance Consultant                           |
| <input type="checkbox"/> 6142 Appraiser (Business Valuation)                  | <input type="checkbox"/> 6156 Investment Advisors                            |
| <input type="checkbox"/> 6145 Appraiser (Gems and Jewelry)                    | <input type="checkbox"/> 6157 Investment Banks                               |
| <input type="checkbox"/> 6146 Appraiser (Machinery and Technical Specialties) | <input type="checkbox"/> 6140 Investment Products/Services/Premium Financing |
| <input type="checkbox"/> 6147 Appraiser (Personal Property)                   | <input type="checkbox"/> 6158 Life Settlement                                |
| <input type="checkbox"/> 6148 Appraiser (Real Property)                       | <input type="checkbox"/> 6178 Managed Futures Specialist                     |
| <input type="checkbox"/> 6130 Auction House                                   | <input type="checkbox"/> 6179 Market Research                                |
| <input type="checkbox"/> 6131 Charitable Organizaton                          | <input type="checkbox"/> 6143 Marketing and Communications                   |
| <input type="checkbox"/> 6132 Coin, Stamp & Art Dealer                        | <input type="checkbox"/> 6159 Mutual Funds                                   |
| <input type="checkbox"/> 6151 Commercial Property Management                  | <input type="checkbox"/> 6167 Oil & Gas Asset Management Services            |
| <input type="checkbox"/> 6180 Competitive Intelligence/Analysis               | <input type="checkbox"/> 6182 Operations or Processing Services              |
| <input type="checkbox"/> 6133 Computer Service & Technology Provider          | <input type="checkbox"/> 6153 Philanthropic Advisors                         |
| <input type="checkbox"/> 6187 Computer Software                               | <input type="checkbox"/> 6164 Private Foundation Management                  |
| <input type="checkbox"/> 6134 Continuing Education Provider                   | <input type="checkbox"/> 6160 Private Placement Life Insurance               |
| <input type="checkbox"/> 6135 Custody Services                                | <input type="checkbox"/> 6183 Publications & Research                        |
| <input type="checkbox"/> 6152 Disability Long Term Care                       | <input type="checkbox"/> 6141 Real Estate Services                           |
| <input type="checkbox"/> 6136 Elder Care Services                             | <input type="checkbox"/> 6171 Relocation and Home Management                 |
| <input type="checkbox"/> 6174 Estate Valuations                               | <input type="checkbox"/> 6161 Retirement Services                            |
| <input type="checkbox"/> 6172 Estates   | <input type="checkbox"/> 6162 RIAs   |
| <input type="checkbox"/> 6137 Executive Search Firms/Recruiters               | <input type="checkbox"/> 6163 Tax Services                                   |
| <input type="checkbox"/> 6166 Family Office Consulting                        | <input type="checkbox"/> 6177 Trust Accounting                               |
| <input type="checkbox"/> 6184 Farm & Ranch Management                         | <input type="checkbox"/> 6168 Trust Administration                           |
| <input type="checkbox"/> 6144 Financial Planners                              | <input type="checkbox"/> 6165 Trust Administration Services                  |
| <input type="checkbox"/> 6138 Genealogical Search Services                    | <input type="checkbox"/> 6175 Trust Services - Non-Custodial                 |
| <input type="checkbox"/> 6139 Industry Associations                           | <input type="checkbox"/> 6169 Trust-Owned Life Insurance                     |
| <input type="checkbox"/> 6154 Industry Certification                          |  |
| <input type="checkbox"/> 6181 Insurance Advisor                               |  |
| <input type="checkbox"/> 6170 Insurance Brokers                               |  |

### Trust Institutions

- 6186 Trust Institutions

# RETURN WITH ALL PAGES BY OCTOBER 12, 2007

**ENHANCED LISTING INFORMATION:** (Trust Institutions ordering the Enhanced Listing in print and/or online 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. _____ |

**MATERIALS INSTRUCTIONS:** (If your package contains logos, company descriptions, mini ads and display ads)

**Company Logos:** E-mail your electronic file in PC format, .eps or .tif, with a resolution of at least 300 dpi to Cristine Hoffmann at [choffmann@penton.com](mailto:choffmann@penton.com). Your print logo will appear 1/2" tall max. Online basic listing logos will appear 300 x 50 pixels max. Online featured supplier logos will appear 120 x 60 pixels max.

**Company Descriptions:** E-mail your 50-word company description in Microsoft Word to Cristine Hoffmann at [choffmann@penton.com](mailto:choffmann@penton.com).

**Mini Ads:** E-mail your 2-1/8" x 1" ad in PC format, .eps or .tif, with a resolution of at least 300 dpi to Cristine Hoffmann at [choffmann@penton.com](mailto:choffmann@penton.com).

**Display Ads:** If you are purchasing the Gold or Silver Package, please contact your sales representative for instructions on how to submit your display ad.

## EXCLUSIVE OPPORTUNITIES ONLINE

In addition to your regular listing options online, the following exclusive options are available in limited quantity on a first come, first served basis:

- **Corporate Banner** - 468x60 pixels banner. Appears at the top of every page throughout the entire buyers guide. Prime Position. Only ONE available per guide. Linkable to the url of your choice. \$250/month or \$3,000/year.
- **Category Sponsorship** - 120x60 pixel sponsorship box and 160x600 vertical skyscraper ad. Sold to the product category. Only ONE available per individual product category. The sponsorship box (120x60 ad) will appear only on the main product category page, but the skyscraper (160x600 ad) will appear on each page within that product category. Both ads are linkable to the url of your choice. \$150/month or \$1,800/year.
- **Category Buttons** - 120x60 pixels ad. Fixed position "below the fold" on the left hand side. Sold to the product category. Only 3 available per product category. Ad is linkable to the url of your choice. \$85/month or \$1,020/year.

**For additional information and/or to book these exclusive opportunities, please contact:**

**Adam Strominger at 212-204-4249; [Adam.Strominger@penton.com](mailto:Adam.Strominger@penton.com)**

## RETURN WITH ALL PAGES BY OCTOBER 12 TO:

Penton Media, Inc., Attn: Evalyn Morton, The Penton Media Bldg, 1300 E. 9th St., Cleveland, OH 44114  
**FAX TO: 913-514-9221**