

Information Required For Tailoring the Presentation To The Audience's Characteristics: FSSN requests the following information and Client agrees to use its best efforts to produce such information, if available, as soon as possible and no later than 30 days prior to the date(s) of the Event (see Schedule A):

(If Client is sponsoring the Event for the benefit of another party, Client's answers should relate to the other party)

PROVIDED

- Event agenda
- Copy of previous year's agenda for the same or similar Event (if applicable)
- Annual or Quarterly Reports (applicable only to public companies)
- Press Releases (recent and relevant)
- Internal Newsletters (recent and relevant)
- Advertising, product/service literature and other promotional materials (recent and relevant)
- Organization Chart (including regional offices if applicable)
- An original copy of the "Client Profile/Factfinder(s)" that Client's producers use
- An Exhibit Schedule, FSSN booth number and list of Exhibitors
- Contact information (name, address, phone number, and e-mail address) of all attendees
- Contact information (name, address, phone number, and e-mail address) of all sponsors

Attendance is ...	<input type="checkbox"/> Mandatory <input type="checkbox"/> Optional
To attend, attendees must ...	<input type="checkbox"/> Pay \$ <input type="checkbox"/> Qualify by <input type="checkbox"/> Attendance is complimentary
If "paid," the fee to attend is ...	
The audience is comprised of the following industry segments ... <i>(check all that apply)</i>	<input type="checkbox"/> Banking <input type="checkbox"/> Broker / Dealer <input type="checkbox"/> Financial Planner <input type="checkbox"/> Fund / Manufacturer <input type="checkbox"/> Insurance <input type="checkbox"/> Wirehouse
The general audience should be referred to as ...	<input type="checkbox"/> Advisors <input type="checkbox"/> Agents <input type="checkbox"/> Associates <input type="checkbox"/> Financial Consultants <input type="checkbox"/> Financial Planners <input type="checkbox"/> General Agents <input type="checkbox"/> General Managers <input type="checkbox"/> Reps <input type="checkbox"/> OTHER (please specify):
The audience primarily serves ... <i>(check all that apply and place a prioritized ranking next to each; i.e., 1,2,3)</i>	<input type="checkbox"/> Business # <input type="checkbox"/> Group # <input type="checkbox"/> Individual #
The audience primarily targets ... <i>(check all that apply and place a prioritized ranking next to each; i.e., 1,2,3)</i>	<input type="checkbox"/> Middle Income # <input type="checkbox"/> High Net Worth # <input type="checkbox"/> Very High Net Worth # <input type="checkbox"/> Ultra High Net Worth # <input type="checkbox"/> OTHER (please specify):
The estimated Event attendance is (see Schedule B) ...	
Indicate the percentage of attendees who are ...	_____ % Producers _____ % Managers _____ % Executives _____ % Staff Personnel _____ % Spouses
The approximate age range of the audience is ...	From _____ to _____ years of age
The average range of industry-specific experience is ...	From _____ to _____ years of experience
The approximate income range of the audience is ...	From \$_____ to \$_____
The name of the top producer in the audience is ...	_____ with an income of \$_____

Producers are compensated ...	<input type="checkbox"/> 100% Fee <input type="checkbox"/> 100% Commission <input type="checkbox"/> Fee and Commission
How many of your producers can charge a fee?	<input type="checkbox"/> All <input type="checkbox"/> Some <input type="checkbox"/> None
Does your company support any particular planning software?	<input type="checkbox"/> Yes <i>(please specify):</i> <input type="checkbox"/> No
Are producers encouraged to do planning?	<input type="checkbox"/> Yes <input type="checkbox"/> No
How many financial plans were completed during the prior year?	
How many financial plans are targeted for completion this year?	
On average, how many financial plans are completed per producer/year?	
What was the company's revenue last year?	\$
What is the company's revenue goal this year?	\$
What is the company's production goal per producer?	\$
What is the current average production per producer?	\$
What is the company's overall strategic objective this year?	
What are the company's objectives for this meeting?	
What would you like the FSSN Speaker to achieve? <i>(please be as specific as possible)</i>	
Any additional information to help FSSN tailor the Event ...	
What other meetings or events does the company host?	<ul style="list-style-type: none"> • • • •

Client

By: _____

Printed Name: _____

Title: _____

Date: _____