

# Cetera Investment Services Client Newsletter Order Form

It's easy to get your order started. Just complete this form and mail it to:  
Merrill Anderson Co., Inc., 1166 Barnum Ave., Stratford, CT 06614-5402

If you have any questions, please call Sirvydas Vebra at Merrill Anderson at (203) 377-4996, ext. 103,  
or e-mail him at [svebra@merrillanderson.com](mailto:svebra@merrillanderson.com).

Series 6     Series 7

Name \_\_\_\_\_ Designation(s) (i.e., ChFP) \_\_\_\_\_ AE # \_\_\_\_\_ Office # \_\_\_\_\_

Title \_\_\_\_\_ Financial Institution \_\_\_\_\_

Registered office street address \_\_\_\_\_

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

Telephone \_\_\_\_\_ Fax number \_\_\_\_\_ E-mail address \_\_\_\_\_

Shipping address (if different from above) \_\_\_\_\_

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

Please note that the above information will appear in the imprint on your newsletters.

*QuarterNotes* is published quarterly. Please begin my subscription with the:

First Quarter       Third Quarter      Quantity per issue \_\_\_\_\_  
 Second Quarter     Fourth Quarter       I would like to receive electronic files of each issue.

## CANCELLATION POLICY

I hereby subscribe to *QuarterNotes*. I agree to notify The Merrill Anderson Company of any changes to and/or cancellation of my subscription at least six weeks prior to the publication date of the next issue. Failure to notify The Merrill Anderson Company within this time frame will result in costs being charged to me, which I agree to pay promptly, or my financial institution will incur the charges.

\_\_\_\_\_  
Subscribing Investment Executive      Date      \_\_\_\_\_ / \_\_\_\_\_  
Office #      I.E. #

I approve of the Investment Executive's subscription to *QuarterNotes*, Cetera Investment Services' quarterly client newsletter. If this Investment Executive fails to notify The Merrill Anderson Company of his or her cancellation within the time frame stated above, or if the Investment Executive terminates his or her employment with this financial institution after the stated issue deadline, this financial institution will be responsible for timely payment of all charges due and permits Cetera Investment Services to deduct the charges from any payments owed to financial Institution.

\_\_\_\_\_  
Program Manager/Financial Institution Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Financial Institution

[See next page](#)

# Cetera Investment Services Client Newsletter Order Form continued

Do you want your photograph to appear on page one of the newsletter?  Yes  No

Do you want the photo in color?  Yes  No

Do you want your bank's logo to appear on page one of the newsletter?  Yes  No

Should the bank's logo be in color?  Yes  No

Do you want to include a custom message on page one in place of the standard message?  Yes  No

If yes, please be sure to submit the message to Ad Review at Cetera Investment Services first.  
Your message may be from 75 to 100 words in length.

Please sign your name in black ink (in both boxes located below) as you would like it to appear in the cover letter in the right column on page one of the newsletter. Please be careful to stay within the box.

**MERRILL ANDERSON WILL PREPARE A PROOF AND SUBMIT IT TO YOU FOR REVIEW.**

Sign Here

Sign Here

Do you want Merrill Anderson to mail the newsletter to your clients and prospects?  Yes  No

Please provide your mailing list electronically as a comma- or tab-delimited file or as an Excel file. The Merrill Anderson Company will provide you with additional information on this option should you choose to have it handle your mailing.

**Thank you for your Order!**

**MERRILL ANDERSON WILL SEND YOU A CONFIRMATION OF YOUR ORDER.**

Please send questions to Sirvydas Vebra at [svebra@merrillanderson.com](mailto:svebra@merrillanderson.com)

The Merrill Anderson Co., Inc. • 1166 Barnum Avenue, Stratford, CT 06614-5402 • (203) 377-4996