



## Essential Communications for Clients, Prospects & Centers of Influence.

**M. Jeffrey Rosen, CLU, ChFC**  
*President, Liberty Publishing, Inc.*

*Liberty Publishing has been the source for financial newsletters for over thirty years and this is why:*

Our organization was founded on the success of a financial services professional.

Today, practicing professionals are an integral part of our editorial and compliance process.

Design, production, and distribution of your newsletters are done on-site to ensure tighter controls on quality and delivery.

### WE WANT YOU TO SEE MORE CLIENTS!

That's why when you join Liberty's newsletter programs we'll take care of as much (or as little) of the work as you'd like.

### PERSONALIZE YOUR NEWSLETTERS

A picture is worth a thousand words and we are here to make you look good on paper. Send us a black and white photograph — taken by a professional — that's either 3" x 5" or 5" x 7" and we'll add it to your mast-head.

### STITCHED-IN BUSINESS REPLY/REFERRAL CARDS

Encourage reader feedback and include business reply/referral cards with each newsletter mailing. This is your opportunity to turn prospects into clients! These cards provide readers the opportunity to tell you their areas of interest, and are a great way for your clients to refer a friend or colleague to you.

### COMPLETE YOUR PRESENTATION WITH PERSONALIZED COMPANION ENVELOPES

The perfect complement to your personalized newsletter is a personalized envelope that includes your name and return address. It's a great way for your newsletter to announce its arrival and also present a complete professional image.

### FREEDOMMAIL™ SERVICE MAXIMIZES YOUR NEWSLETTER DISTRIBUTION

Put your entire newsletter distribution program in the hands of experts. Liberty Publishing will establish and manage your client list for newsletter distribution, including ongoing changes. FreedomMail™ maximizes the value of our marketing partnership and is part of our complete approach to client service. We follow your newsletters from production through to first-class mailing to your clients.

### ONLINE NEWSLETTERS ADD VALUE TO YOUR WEBSITE

Liberty Publishing will provide you with the same fully customized and personalized newsletter for your website. Your online version includes articles, graphics, photos, charts, and graphs. Give your clients the electronic financial news they can use.

**Liberty**  
PUBLISHING, INC.

The Source for Insurance and Financial Communications

# CLIENT and PROSPECT NEWSLETTERS

Liberty Publishing *strongly recommends* that each financial advisor send clients a high quality newsletter on a regular basis. Your cost, including envelopes, postage and handling is far outweighed by the value of client retention and increased referrals. The editorial quality and print production by Liberty Publishing has been superior for over 30 years. You need to keep your name, logo and the images of you and your key staff members in front of clients and other professional advisors on a regular basis.



## THE FINANCIAL INSIDER

**Focus:** Higher Net Worth Planning Strategies, Business Planning, and Financial Peer Group Networking

**Published:** Bi-Monthly

The *Financial Insider* newsletter is the comprehensive planning tool for higher net worth clients, professionals, business owners, and centers of influence. This eight-page newsletter delivers clear and concise analysis on some of the most complex investment, tax, economic, and estate planning strategies. *The Financial Insider* was developed specifically for advanced financial planning professionals. *The Financial Insider* generates a powerful impact as an informative resource and for increasing your market reach.



## THE 20/20 LETTER

**Focus:** Personal Finance, Money Matters, and Insightful Planning

**Published:** Choice of Monthly, Bi-Monthly, or Quarterly

*The 20/20 Letter* is designed for cultivating your personal clients. This four-page newsletter focuses on building awareness and knowledge. It's the perfect communication tool for all demographic and financial profiles. Using *The 20/20 Letter* achieves two fundamental goals. First, it keeps personal clients abreast of developments and accurate, up-to-date information on insurance, retirement planning, mutual funds, annuities, investing, and a whole lot more. Second, it solidifies and expands your market presence.



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Phone: 800-722-7270 x135 • Fax: 978-777-5929  
<http://www.libertyink.com>

# NEWSLETTER ORDER FORM

## THE FINANCIAL INSIDER AND THE 20/20 LETTER

OFFICE USE	
ACCT # _____	
START _____	
ENV _____	MS _____
PHOTO _____	RET _____
LOGO _____	BRC _____

**MAILING ADDRESS**  
(Personalization details on back)

NAME \_\_\_\_\_ TITLE \_\_\_\_\_

COMPANY \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

TELEPHONE # \_\_\_\_\_ FAX # \_\_\_\_\_ E-MAIL \_\_\_\_\_

**NEWSLETTER PRICE PER COPY**

<i>The Financial Insider</i> is published in January, March, May, July, September, and November. <i>The 20/20 Letter</i> is available monthly, bimonthly, or quarterly.										
Quantity per Issue	100	150	200	250	300	350	400	500	750	1,000+
<i>The Financial Insider</i> price per copy*	\$ .99	.98	.97	.96	.95	.94	.93	.92	.91	.90
<i>The 20/20 Letter</i> price per copy*	\$ .68	.67	.66	.65	.64	.63	.62	.60	.59	.58

\*Color imprints are available for an additional \$.25 per copy.

**THE 20/20 LETTER ENVELOPE PRICING**

QUANTITY	PRICE	QUANTITY	PRICE
500	\$99.00	2,500	\$340.00
1,000	\$149.00	3,000	\$395.00
2,000	\$275.00	5,000	\$595.00

**FINANCIAL INSIDER & 20/20 BUSINESS REPLY CARD PRICING**

\$.25 each  
Encourage reader feedback and referrals!

**NEWSLETTER ORDER**

**The Financial Insider (8 Pages)**  
(Includes Free 9" x 12" personalized envelopes)  
Imprinted with  Photo  Logo

**The 20/20 Letter (4 Pages)**  
 monthly  bimonthly  quarterly

THE FINANCIAL INSIDER	
Newsletter	_____ x _____ = _____ <small style="text-align: center;">QUANTITY PRICE EACH</small>
One-Time Setup Fee	= <span style="border: 1px solid black; padding: 2px;">\$35.00</span>
Companion Envelopes	= <span style="border: 1px solid black; padding: 2px;">FREE</span>
Business Reply/ Referral Cards	_____ x $\frac{\$.25}{\text{PRICE EACH}}$ = _____ <small style="text-align: center;">QUANTITY</small>
Shipping fee \$12.95	= <span style="border: 1px solid black; padding: 2px;">\$12.95</span>
Mass. residents only: 6.25% Sales Tax	= _____
Online Version: \$65.00	= _____
Choose format: <input type="checkbox"/> pdf <input type="checkbox"/> html	
<b>OPTIONAL FREEDOMMAIL™</b>	
Number of clients on mailing list:	_____ x \$1.23 = _____
\$20 List Setup fee* (send file in .xls., .csv or .txt format)	= _____
<b>Total amount due</b>	= <span style="border: 2px solid red; padding: 2px;">_____</span>

THE 20/20 LETTER	
Newsletter	_____ x _____ = _____ <small style="text-align: center;">QUANTITY PRICE EACH</small>
One-Time Setup Fee	= <span style="border: 1px solid black; padding: 2px;">\$35.00</span>
Companion Envelopes	_____ = _____ <small style="text-align: center;">QUANTITY</small>
Business Reply/ Referral Cards	_____ x $\frac{\$.25}{\text{PRICE EACH}}$ = _____ <small style="text-align: center;">QUANTITY</small>
Shipping fee \$12.95	= <span style="border: 1px solid black; padding: 2px;">\$12.95</span>
Mass. residents only: 6.25% Sales Tax	= _____
Online Version: \$39.00	= _____
Choose format: <input type="checkbox"/> pdf <input type="checkbox"/> html	
<b>OPTIONAL FREEDOMMAIL™</b>	
Number of clients on mailing list:	_____ x \$.74 = _____
\$20 List Setup fee* (send file in .xls., .csv or .txt format)	= _____
<b>Total amount due</b>	= <span style="border: 2px solid red; padding: 2px;">_____</span>

\*After initial set-up, there is a \$9.50 per issue maintenance fee, which allows you to make changes, additions, or deletions to keep your list current.

**FORM OF PAYMENT**

Check enclosed payable to Liberty Publishing, Inc.  
 Visa  MasterCard  American Express or Optima  Discover

**AUTOMATIC CREDIT CARD AUTHORIZATION**

CARD NUMBER \_\_\_\_\_ CCIN # \_\_\_\_\_ EXPIRATION DATE \_\_\_\_\_ SIGNATURE (required) \_\_\_\_\_  
 If you choose the convenience of using your credit card, it will be charged automatically, at the time of each billing.

# Questions? Call 800-722-7270, ext. 135

## PERSONALIZATION

Please attach an original **or** photocopy of your business card and mark any desired changes. Or, on the lines below, print or type exactly what you want to appear on your newsletter. Please be specific about placement, upper/lowercase letters, titles, and spelling. **Please print the information in the order you wish it to appear. Please remember to include any required state license numbers.**

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## PHOTOS AND LOGOS

- For best results, electronically send your photo and/or logo as a .tif, .eps, .jpg, or .gif file (for highest quality, save the image at high resolution), *OR*
- If you send a printed version of your photograph and/or logo, please use one between the sizes of 3" x 5" and 5" x 7".

## ENVELOPE AND BUSINESS REPLY CARD IMPRINTS

**Personalized envelope**  
name and return address.

**Personalized business reply card name**  
and return address. (Please indicate *either*  
a street address *or* P.O. Box.)

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## PRE-PRINTED PERMIT NUMBERS

**ENVELOPE bulk rate permit number to be imprinted.**  
(Used in post office mailings of 200 or more newsletters.)  
**(FreedomMail™ subscribers *do not* complete this section.)**

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BULK RATE NUMBER

CITY

STATE

**BUSINESS REPLY CARD permit number.**

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BUSINESS REPLY NUMBER

CITY

STATE

## TERMS OF AGREEMENT CONTRACT

Liberty Publishing, Inc., will ***automatically continue*** my subscription until advised in writing to discontinue. I agree to provide the ***required 45 days' written notice*** prior to issue for all subscription changes (masthead, photo, envelope, business reply card, quantity, holds, or cancellations). I agree to be billed 45 days in advance of the mailing date of each issue.

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Subscriber Signature (Required)

Date

Please allow six weeks to process your order.

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**FAX: 978-777-5929 • [www.libertyink.com](http://www.libertyink.com)**