

Trusts & Estates® 2010 Wealth Management Resource Guide Enrollment Form for Philanthropic Giving

35% price reduction Philanthropic and charitable organizations receive a special 35% reduction on our regular listing prices. Respond by Oct. 14, 2009 to be included in this guide.

Print Packages Choose from the listing options below--note: all prices shown reflect 35% reduction

- Basic Listing: \$61.75 per year** 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.
- Company Description: \$32.50 additional per year** Includes a 50-word company description with your listing.
- Mini Ad: \$390 additional per year** Includes a 2-1/8" x 1" ad with your listing plus a 6-time, 1" ad throughout the year in the magazine.
- Preferred: \$113.75** Includes all the information in the Basic Listing plus your company logo and a **boldface** listing.
- Silver Package: \$1,852.50** Includes all items in the Preferred Package plus a 50-word company description and a 1/4-page display ad.
- Gold Package: \$3087.50** Includes all items in the Preferred Package plus a 50-word company description and a 1/2-page display ad.

Print production, display information, and multiple listings contacts — see page 3.

Trust Institutions Only

- Upgraded Listing: \$32.50 additional** Includes your company's total discretionary, total non-discretionary and total trust assets with 10 key personnel with your listing.
- Trusts & Estates Package \$776.75** Includes 6.75" x 4.5" ad, located near state you specify. For multiple states, contact Adam Strominger ph. 212.204.4249 email: Adam.Strominger@penton.com for special pricing.

Sample: Preferred Package plus Upgrade Listing

- Increase your visibility and brand recognition when you add your logo
- Add company info including assets and key personnel

Sample only. Images not to scale.



Online Packages Choose from the options below--note: all prices shown reflect 35% reduction

- Basic Listing: \$130 per year**
Must be purchased to be in the online addition. Includes company name, address, phone, toll-free phone, fax, e-mail, web url, one contact, and company logo.
- Company Description: \$32.50 additional** Includes a 50-word company description with your listing.
- Landing Page Links: \$32.50 additional** Add 5 specific url's anywhere in your website to your online listing.
- Featured Supplier: \$97.50 each additional.** Be at the top of the directory's product category with your logo, and designation as a featured supplier.

Additional Online Options – Limited Quantities

Available in limited quantity on a first come, first served basis.

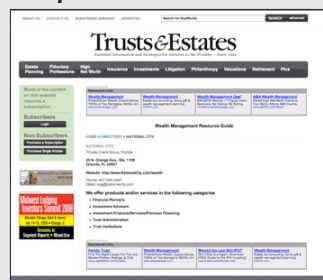
Corporate Banner – 468x60 pixels banner. Appears at the top of every page throughout the entire online buyers guide. Only one available. Linkable to the url of your choice. **\$162.50 per month or \$1,950 per year.**

Category Sponsorship –
Sponsorship box, 120x60 pixels ad *on the main product category page.*
Skyscraper 160x600 *will appear on each page within that product category.* Sold to the product category, one available. Both ads can be linked to the url of your choice. **\$97.50 per month or \$1,170 per year.**

Category Buttons – 120x60 pixels ad. Fixed position is below the fold, on the left side. Sold to the product category. 3 available per product category. Ad can be linked to the url of your choice. **\$55.25 per month or \$663 per year.**

Submitting online deliverables — see page 3.

Sample: Online Basic Listing plus Company Description



- Increase your visibility and brand recognition when you add your logo
- Add company info including assets and key personnel

Sample only. Images not to scale.

For Your Charity or Philanthropic Organization to participate in our 2010 Wealth Management Resource Guide, contact:

Organizations A-L, contact Adam Strominger
ph: 212.204.4249 adam.strominger@penton.com

Organizations M-Z, contact Sara Hellon
ph: 866.353.9735 sara.hellon@penton.com

Continue to Page 2 for Listing Form & Categories

Basic Listing Information (All companies must complete)

Company Information (for publication) Company/Division: _____

E-mail contacts: _____

Web Site URL: _____ Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Phone: _____ Toll-Free Phone: _____ Fax: _____

Contact Name: _____ Title: _____

Upgraded Listing Information (Trust Institutions ordering the Upgraded Listing in print and/or online must complete)

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. _____ |

Product Categories (All companies must complete) Select up to 5 categories as part of your basic listing. Banks and Financial Institutions must select the Trust Institutions category only. Note: we will only key in the first 5 categories selected.

Trust Institutions Only:

- Trust Institutions (0285)

Product and Services Categories

- 1031 Exchanges (0100)
- Annuities (0105)
- Appraisers (Business Valuation) (0065)
- Appraisers (Gems & Jewelry) (0080)
- Appraisers (Machinery & Technical Specialties) (0085)
- Appraisers (Personal Property) (0090)
- Appraisers (Real Property) (0095)
- Auction Houses (0005)
- Charitable Organizations (0010)
- Coin, Stamp & Art Dealers (0015)
- Commercial Property Management (0110)
- Competitive Intelligence/Analysis (0255)
- Computer Service & Technology Providers (0020)
- Computer Software (0290)
- Continuing Education Providers (0025)
- Custody Services (0030)
- Disability Long-Term Care (0115)
- Elder Care Services (0035)

- Energy Sector Specialists (0310)
- Estate Valuations (0225)
- Estates (0215)
- Executive Search Firms/Recruiters (0040)
- Family Office Consulting (0185)
- Farm & Ranch Management (0275)
- Financial Planners (0075)
- Genealogical Search Services (0045)
- Industry Associations (0050)
- Industry Certification (0125)
- Insurance Advisors (0260)
- Insurance Brokers (0205)
- Insurance Companies (0130)
- Insurance Consultants (0220)
- Investment Advisors (0135)
- Investment Banks (0140)
- Investment Products/Services/Premium Financing (0055)
- Life Settlement (0145)
- Managed Futures Specialist (0245)
- Market Research (0250)
- Marketing & Communications (0070)

- Master Limited Partnerships (MLPs) (0300)
- Mutual Funds (0150)
- Oil & Gas Acquisition & Development (0315)
- Oil & Gas Asset Management Services (0190)
- Oil & Gas Exploration & Production (0320)
- Oil & Gas Properties (0305)
- Operations or Processing Services (0265)
- Philanthropic Advisors (0120)
- Private Foundation Management (0175)
- Private Placement Life Insurance (0155)
- Publications & Research (0270)
- Real Estate Services (0060)
- Relocation & Home Management (0210)
- Retirement Services (0160)
- RIAs (0165)
- Tax Services (0170)
- Trust Accounting (0240)
- Trust Administration (0195)
- Trust Administration Services (0180)
- Trust Services (Non-Custodial) (0230)
- Trust-Owned Life Insurance (0200)

Continue to Page 3 for Insertion Order & Payment Options

Insertion Order/Authorization/Production & Deliverables

- YES, include my company's listing(s) in the 2010 Wealth Management Resource Guide. I have indicated my listing options on page 2 of this listing enrollment form.

Authorized Signature _____ Date _____

Ordered by: Name _____ Title _____

Company & Address _____

City _____ State _____ Zip _____ Country _____

Phone _____ Fax* _____

E-mail** _____

TOTAL \$ _____

Print Production, Advertising & Listings Information

Submitting Print Deliverables and Display Ads:

Contact Adam Strominger, ph: 212.204.4249 email Adam.Strominger@penton.com

Multiple Office Listings: If your company has multiple offices to list, email: Adam.Strominger@penton.com to receive a special listing form.

Send Images, Descriptions and Mini Ads to: Melissa Abbott Mudd, melissa.abbottmudd@penton.com.

*Your fax number is used to communicate with 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.

Submitting Online Deliverables

Sending images & company descriptions: E-mail print and/or online logos and mini ads (.eps or .tif) 300 dpi. Print logo will appear 1/2" tall max. Online basic listing logos appear 300 x 50 pixels max. Online featured supplier logos appear 120 x 60 pixels max.

Company Descriptions: E-mail Microsoft Word document, in 50-words or less.

Online Mini Ads: E-mail your 2-1/8" x 1" ad in PC format, .eps or .tif; 300 dpi.

For Additional Listings Information: Contact: Adam Strominger, ph. 212.204.4249 Adam.Strominger@penton.com.

Payment Options

- Bill me at the above address
Look for my check made payable to Penton Media, sent to: Penton Media, Inc. Attn: Shalan Mill, Wealth Management Resource Guide, 9800 Metcalf Ave., Overland Park, KS 66212
Charge my Visa MC Amex

Name on Card _____ Card# _____ Exp. ____ / ____

Contact information for Trust & Estates Philanthropic 2010 Wealth Management Guide

Organizations A-L, contact Adam Strominger ph: 212.204.4249 adam.strominger@penton.com

Organizations M-Z, contact Sara Hellon ph: 866.353.9735 sara.hellon@penton.com

For all display ads, contact Adam Strominger ph: 212.204.4249 adam.strominger@penton.com

Send images to Melissa Abbott Mudd at melissa.abbottmudd@penton.com, or mail to: Penton Media, Inc. Attn: Wealth Management Resource Guide 9800 Metcalf Ave., Overland Park, KS 66212

Fax completed forms to 913.967.7207

Opt-out Policy

Check here if you do not wish to receive future unsolicited fax advertisements from the Wealth Management Resource Guide at the fax number shown at the top of this page and fax this page back to 866-364-8597. Alternately, you may phone us at 866-271-1964 or send an email to fax-opt-out@penton.com. Please include both the fax number to be removed from the list and the name of the Penton business from which you do not wish to receive faxes. Our failure to comply with your removal request within the shortest reasonable time, as determined by the FCC, with such valid request identifying the telephone facsimile machine(s) to which the request relates would be unlawful.