



Marketing Opportunity Report

Exclusively Prepared for:

Test Record

Test Company

November 7, 2014
Version 1

Presented by:
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Name
Company Name
Address
City State Zip

Dear Name:

We appreciate the opportunity to work with you to design and execute a couple of effective marketing strategies. RME360 specializes in new client acquisition through several tested and proven direct marketing programs.

For 19 years now, we have formed many relationships with clients and helped provide them with marketing education, valuable consumer data, industry insight, and proven prospecting methods that are generating thousands of quality leads through our Neighborhood Marketing approach.

Our main goal is to promote you and increase your production. We will generate a continuous flow of prospects that will build a predictable and strategic marketing and sales process to get you in front of the most ideal individuals in your area....all year long.

We look forward to building a mutually beneficial relationship.

Sincerely,

A handwritten signature in black ink that reads 'Scott Kasprzyk'.

Scott Kasprzyk
National Account Executive





OVERVIEW

About RME:

RME360 is a comprehensive direct marketing solutions company based in Tampa, FL. Since 1995, RME has specialized in client acquisition strategies by leveraging turnkey event marketing programs and lead generation campaigns. Our clients benefit from the insight and knowledge gained from over 17 million compiled responses.

RME360 continues to be a pioneer in direct marketing for financial services firms through innovative thinking and state of the art technology. Our single source solution is a comprehensive design for the complete marketing cycle.

- Planning
- Programs
- Preparation
- Integration
- Execution
- Results

Results-Focused Solutions:

- Event Marketing
- One-on-One Appointments
- Media (radio, print, outdoor)
- Data Services
- Digital Services (SEO, PPC, Email Marketing, Retargeting)
- Creative Services and Copyrighting
- Professional Services

Best Practices Consulting Services:

RME360 Marketing Consultants will provide individual representative level consulting. The initial consultation includes, but is not limited to: representative's background and experience; demographics of their customer base and ideal prospects; past marketing efforts – successes and failures; marketing budget; client acquisition goals – both short and long term; Neighborhood Market Research report; and assistance in helping develop a marketing strategy. The consulting process continues with post campaign analysis and strategic adjustments as needed.



MARKET RESEARCH

Distributed: Total Source
Search ID: SKasprzyk-108
Title: Test Run
Date Run: 11/11/2014 2:04:09 PM
Record Total: 16,449
Name: Test Run
Notes:
Geography
Radius
15 miles from 78633 (Type:DISTANCE Precision:ROOFTOP State Boundaries:No)
Demographic: ALL
Address Quality
Address Matched DPV
Address Type
House Number and Street Name Present, Rural/Highway Contract, Rte No. With Box Number, Box Number Only
Age - Adult Freeform Exact Age
55~70
Dwelling Type
Condominium, Multi-Family Dwelling Unit, Single Family Dwelling Unit
Income Producing Assets
\$100,000-\$249,999, \$250,000-\$499,999, \$500,000-\$749,999, \$750,000-\$999,999, \$1,000,000-\$1,999,999, \$2,000,000 or More
NCOA Verified
NCOA Verified
Homeowner/Renter
Definite Owner
One Per/All Per Household or Address
One Per Address (default)
Only Records with a Zip+4 Address
Only Records with a Zip+4 Address
NCOA Bulk Mail Info
NCOA Expiration Date: 12/02/2014 The Total Source Data File is considered to be Move Update compliant if the addresses are mailed within 95 calendar days of the NCOA processing. Each order will be accompanied by an NCOA certificate. Mailers will need to present the NCOA certificate when entering a mailing with the USPS.



The Results...

Report Breakdown By: Zip5 Radius			
Zip5 Radius	Description	Radius Distance	# Records
78633	GEORGETOWN, TX	0.00	3762
76537	JARRELL, TX	10.29 N	110
78642	LIBERTY HILL, TX	11.42 W	489
78646	LEANDER, TX	12.26 SW	1
78665	ROUND ROCK, TX	12.82 S	1228
78641	LEANDER, TX	13.61 SW	1797
78681	ROUND ROCK, TX	13.82 S	2960
78680	ROUND ROCK, TX	13.83 S	2
76573	SCHWERTNER, TX	14.71 NE	1
76542	KILLEEN, TX	15.00 N	8
76549	KILLEEN, TX	15.00 N	1
76571	SALADO, TX	15.00 N	27
76511	BARTLETT, TX	15.00 NE	6
76530	GRANGER, TX	15.00 NE	34
78605	BERTRAM, TX	15.00 NW	4
78634	HUTTO, TX	15.00 S	153
78664	ROUND ROCK, TX	15.00 S	573
78613	CEDAR PARK, TX	15.00 SW	1007
78717	AUSTIN, TX	15.00 SW	552
78628	GEORGETOWN, TX	4.40 S	2661
78626	GEORGETOWN, TX	6.96 S	933
78673	WALBURG, TX	9.03 NE	2
78674	WEIR, TX	9.04 SE	3
76527	FLORENCE, TX	9.63 N	135
Total			16449

Report Breakdown By: Email Flag		
Email Flag	Description	# Records
0	No Email Code Available	12801
1	Only Records with Email Code	3648
Total		16449

Report Breakdown By: Telephone Numbers		
Telephone Numbers	Description	# Records
0	No Phone Number Available	14997
1	Only Records with a Telephone Number	1452
Total		16449

The Results – Income Producing Assets

Report Breakdown By: Zip5 Radius - Income Producing Assets

Zip5 Radius	Description	\$100,000- \$249,999	\$250,000- \$499,999	\$500,000- \$749,999	\$750,000- \$999,999	\$1,000,000- \$1,999,999	\$2,000,000 or More	# Records	Radius Distance
78633	GEORGETOWN, TX	645	851	375	275	684	946	3776	0.00
78628	GEORGETOWN, TX	623	544	292	242	513	455	2669	4.40
78626	GEORGETOWN, TX	488	230	81	64	61	15	939	6.96
78673	WALBURG, TX	1	0	0	0	1	0	2	9.03
78674	WEIR, TX	3	0	0	0	0	0	3	9.04
76527	FLORENCE, TX	64	40	12	5	9	4	134	9.63
76537	JARRELL, TX	75	23	7	3	2	2	112	10.29
78642	LIBERTY HILL, TX	210	121	52	46	49	14	492	11.42
78646	LEANDER, TX	1	0	0	0	0	0	1	12.26
78665	ROUND ROCK, TX	466	345	150	112	110	39	1222	12.82
78641	LEANDER, TX	858	465	181	119	132	46	1801	13.61
78681	ROUND ROCK, TX	672	663	340	320	605	348	2948	13.82
78680	ROUND ROCK, TX	1	1	0	0	0	0	2	13.83
76573	SCHWERTNER, TX	1	0	0	0	0	0	1	14.71
76542	KILLEEN, TX	2	2	2	0	1	0	7	15.00
76549	KILLEEN, TX	1	0	0	0	0	0	1	15.00
76571	SALADO, TX	8	10	3	3	2	1	27	15.00
76511	BARTLETT, TX	6	1	0	0	0	0	7	15.00
76530	GRANGER, TX	15	9	4	2	3	0	33	15.00
78605	BERTRAM, TX	1	1	1	0	1	0	4	15.00
78634	HUTTO, TX	87	24	20	6	13	4	154	15.00
78664	ROUND ROCK, TX	341	123	30	27	32	17	570	15.00
78613	CEDAR PARK, TX	345	273	100	82	145	61	1006	15.00
78717	AUSTIN, TX	67	86	57	57	148	136	551	15.00
COLUMN TOTALS		4981	3812	1707	1363	2511	2088	16462	

Seminar and Locations Results In Your Area

Round Rock, TX

Order ID: [322631](#) Quantity Mailed: 5000 Campaign Response Rate: 0.80%

Event Date/Time	Venue	Address	City	State	Zip	Max Attend	Reservations	Wait List	Cancellations	Fill Rate
6/19/2013 6:30:00 PM	Main Street Grill	118 E Main St	Round Rock	TX	78664-5243	16	16	0	3	100.00%
6/18/2013 6:30:00 PM	Main Street Grill	118 E Main St	Round Rock	TX	78664-5243	16	14	1	6	87.50%

Order ID: [324879](#) Quantity Mailed: 5000 Campaign Response Rate: 1.34%

Event Date/Time	Venue	Address	City	State	Zip	Max Attend	Reservations	Wait List	Cancellations	Fill Rate
9/24/2013 6:30:00 PM	French Quarter Round Rock	901 Round Rock Avenue	Round Rock	TX	78681	28	28	9	0	100.00%
9/18/2013 6:30:00 PM	French Quarter Round Rock	901 Round Rock Avenue	Round Rock	TX	78681	15	15	6	9	100.00%

Austin, TX

Order ID: [328060](#) Quantity Mailed: 5000 Campaign Response Rate: 1.14%

Event Date/Time	Venue	Address	City	State	Zip	Max Attend	Reservations	Wait List	Cancellations	Fill Rate
1/29/2014 6:30:00 PM	Fleming's Prime Steakhouse & Wine Bar	11600 Century Oaks Ter	Austin	TX	78758-8686	30	28	2	11	93.33%
1/21/2014 6:30:00 PM	Fleming's Prime Steakhouse & Wine Bar	11600 Century Oaks Ter	Austin	TX	78758-8686	30	14	0	2	46.67%

Order ID: [329565](#) Quantity Mailed: 5000 Campaign Response Rate: 1.24%

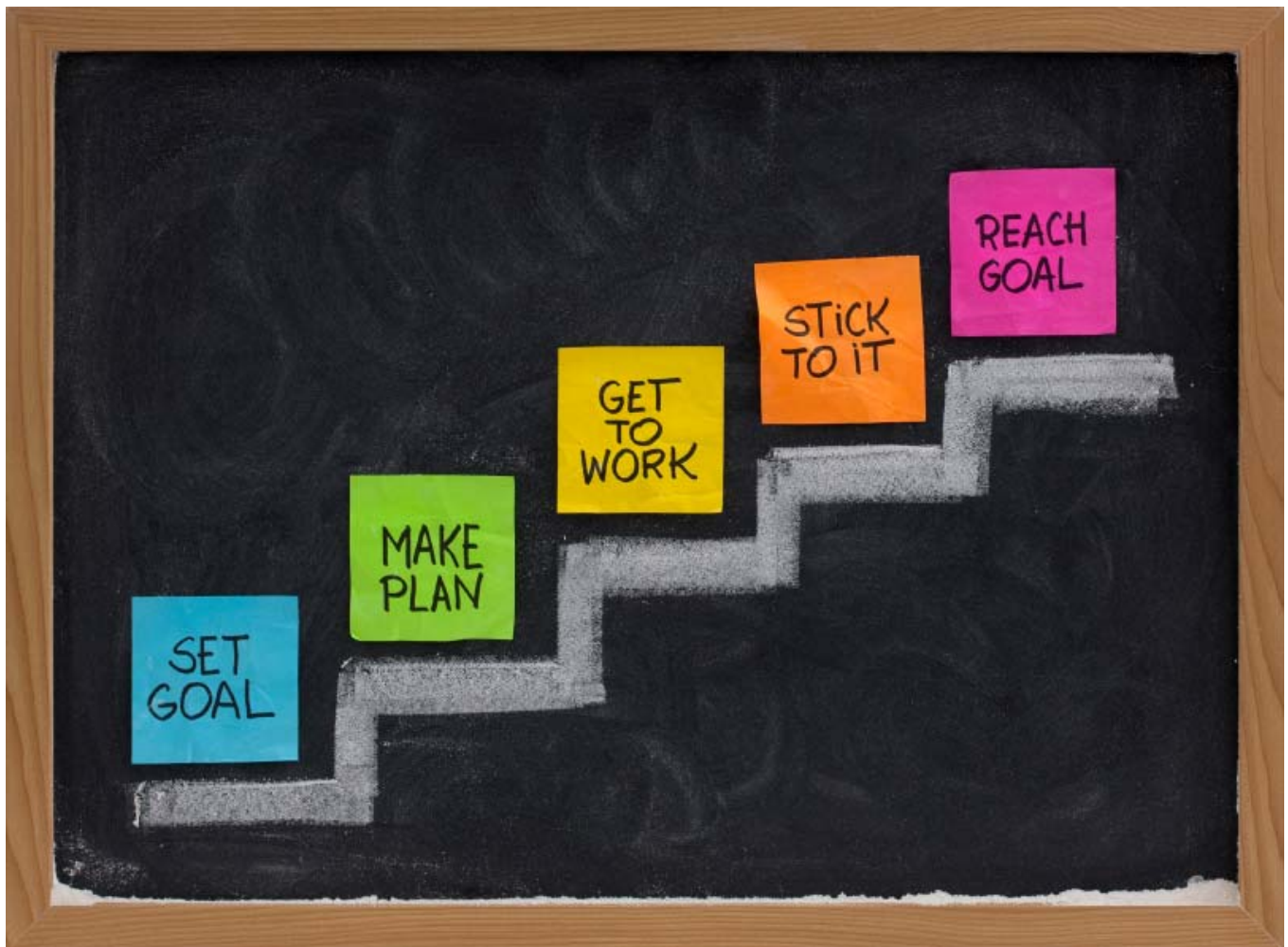
Event Date/Time	Venue	Address	City	State	Zip	Max Attend	Reservations	Wait List	Cancellations	Fill Rate
3/11/2014 6:30:00 PM	Gumbo's Steak & Seafood	12823 Shops Pkwy	Bee Cave	TX	78738	60	16	0	2	26.67%
3/13/2014 6:30:00 PM	Gumbo's Steak & Seafood	12823 Shops Pkwy	Bee Cave	TX	78738	60	42	0	2	70.00%

Goal Mapping 360

RME360's proprietary goal mapping tool is designed to assist advisors in defining their annual marketing plan to exceed their defined production goals.

What's included on the report:

- New Clients Needed
- Number of Marketing Campaigns
- Estimated Buying Units
- Estimated Appointments
- Estimated New Clients
- Estimated Commissions
- Estimated Investment (Marketing / Meals)
- Projected Return On Investment



INSURMARK GOAL MAPPING

Seminar Mailing Size	6000	Seminar Response	1.00%				
Concierge Mailing Size	6000	Concierge Appointments Per Thousand	1				
Cost Per Piece Seminar	\$ 0.75						
Cost Per Piece One On One	\$ 0.77						
Assets Obtained Goal	\$ 10,000,000.00	Clients Needed	34				
Percentage from Other Activities	15%	Proposed Plan	35				
Net Goal	\$ 8,500,000.00						
Avg Assets Needed Per Program	\$ 850,000.00						
	<u>Number of Campaigns</u>	<u>Buying Units / Opportunities</u>	<u>Appointments</u>	<u>Clients</u>	<u>Clients Per Camp.</u>	<u>Appointment Percentage</u>	<u>Closing Percentage</u>
Seminar Campaigns	6	234.00	81.90	27.03	4.50	35%	33%
One on One Campaigns	4	N/A	24.00	7.92	1.98		33%
Total Campaigns	10	Total	105.90	34.95	Avg Clients Per Campaign		3.24
Average Client Size	\$ 250,000.00	Fees Charged	1.00%	Comp Per Fee Based Client	\$ 1,750.00		
Percentage of Fee Based	70%	Transactional Comp	7.0%	Comp Per Trans Client	\$ 5,250.00		
Percentage of Transactional Business	30%						
Projected Assets Obtained	\$ 8,736,750.00	Total Comp	\$ 244,629.00	Avg Per Client	\$ 7,000.00		
Marketing Investment	\$ 45,480.00	Comp Per Campaign	\$ 24,462.90				
Meal / Gift Card Cost Calculation	<u>Meals and/or Gift Cards</u>	<u>Cost Per Plate or Appointment</u>	<u>Total</u>				
Seminars	360 \$	40.00 \$	14,400.00				
Concierge	24 \$	- \$	-				



Marketing Investment	\$ 45,480.00
Meal / Gift Card Total	\$ 14,400.00
Total Investment	\$ 59,880.00
Net Comp	\$ 184,749.00
Net Comp Per Campaign	\$ 18,474.90
ROI	409%

Investing Back Into Your Business

Marketing Allocation	0%
Marketing Dollars	\$ -

Fee Based Business	
Year	Yearly Multiplier
1	\$ 61,157.25
2	\$ 122,314.50
3	\$ 183,471.75
4	\$ 244,629.00
5	\$ 305,786.25

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