



Less Stress, More Enjoyment

Discount Benefit Card



MARKETING★
FINANCIAL

new benefits
creating advantage.

Disclosures:

This is NOT insurance.

Discount Medical Plan Organization: New Benefits, Ltd. Attn: Compliance Department, PO Box 671309, Dallas, TX 75367-1309

This plan provides discounts at certain healthcare providers for medical services.

This plan does not make payments directly to the providers of medical services.

The plan member is obligated to pay for all healthcare services but will receive a discount from those healthcare providers who have contracted with the discount plan organization.

This discount card program contains a 30 day cancellation period.

FL, LA, ND, OK, SC, SD, TX residents: Member shall receive a full refund of membership fees, excluding registration fee, if membership is cancelled within the first 30 days after the effective date.

Disclosures:

AR and TN residents: A refund of all fees will be issued if membership is cancelled within the first 30 days.

MD Residents: The membership fee and one-time registration fee (minus \$5.00) will be refunded if cancelled within the first 30 days and upon return of the discount card.

The range of discounts for medical or ancillary services provided under the plan will vary depending on the type of provider and medical or ancillary service received.

The discount medical card program makes available, before purchase and upon request, a list of program providers, including the name, city, state, and specialty of each program provider located in the cardholder's service area.

Telephone number of Discount Medical Plan Organization: 800-800-7616

Internet website address to obtain participating providers is www.locateproviders.com

New Benefits Company History

New Benefits, Ltd is a privately held company with 100+ employees. Located in Dallas, Texas, New Benefits owns and operates Coast to Coast Vision Plan (CTC), NB PBM and UHS Chiropractic networks. New Benefits was expanded in December of 1993 to provide discounts on prescription drugs, dental care, and hearing aids, in addition to the successful CTC Vision - all on one membership card.

Over the years, New Benefits has been recognized as the pioneer in the discount health card industry. Since 1993, the portfolio has been enhanced and today is considered the single source solution for discount health and lifestyle benefits.

Clients include: Assurant, American Republic, ebay, Money Concepts, TransAmerica, Avon, and Touchstone Energy.



Marketing Financial

In 1989 Marketing Financial, was formed as a full service brokerage and consulting firm that works exclusively with professionals, marketing groups, associations, agencies and other financial entities such as CPAs, banks, trust companies and broker dealers. Our mission is to provide operational support, marketing consultation and partnership alliance programs for the clients we do business with.

Marketing Financial wholesales over 30 highly rated insurance companies. The list includes some of the highest rated names in the business such as American General, AVIVA, AXA, ING, John Hancock, Lincoln Financial & Prudential. Our core product offerings include: Life Insurance, Annuities, Executive Benefits, Disability, Long Term Care and Group/Voluntary Benefits.

MARKETING 
FINANCIAL

Why market the New Benefits Discount Program???

- The opportunity to take care of your clients!
- Strong brand loyalty with discount card that has your picture & web address
- Opportunity to generate significant leads by marketing discount program to business owners, associations & non-profits
- Aggressive commission structure with recurring monthly revenues



MARKETING★
FINANCIAL

new benefits
creating advantage.

A turn-key solution by **Marketing Financial & New Benefits** that will pay financial institutions, associations, and non-profits Top-Tier Commissions for promoting your customized card.

The card can even be co-branded to the organizations name, logo and contact info. A revolutionary idea to provide ongoing revenue to these organizations based on your marketing efforts.

Ideal for Financial Institutions,
Associations, Employer Groups
Non-Profits, Church Organizations,
Community Foundations, and many more!

MARKETING
FINANCIAL

new benefits
creating advantage.

THESE BENEFITS ARE NOT INSURANCE!

- EASY TO USE
- NO HEALTH RESTRICTIONS
- USE IMMEDIATELY UPON RECEIPT OF CARD
- NO LIMIT ON NUMBER OF VISITS
- NO PAPERWORK



EVERYONE BENEFITS!

Member Demographics

- All Age Groups
- Seniors
- Travelers
- The Insured With
- High Deductible Plans
- The Non-insured





- TelaDoc is a national network of board certified physicians providing telephonic cross coverage consultations 24/7 when your primary care physician is not available.
- Consulting physicians use electronic health records (EHRs) to diagnose routine medical problems, recommend treatment and may prescribe short-term, non DEA controlled prescriptions, when appropriate.
- Members simply make a phone call and in most cases, speak to a physician in about 30 minutes (3 hours guaranteed).

TelaDoc™ Disclaimers:

TelaDoc does not replace the primary care physician. TelaDoc is not available in Oklahoma.

TelaDoc does not guarantee that a prescription will be written and operates subject to state regulations.

TelaDoc does not prescribe DEA controlled substances. TelaDoc physicians reserve the right to deny care for potential misuse of services. TelaDoc, Inc. © 2002-2010

VISION CARE, EYEWEAR & OPHTHALMOLOGY NETWORK

- 20% to 60% savings on eyewear.
- Over 12,000 locations nationwide.
- Most frames, lenses and specialty items are available.
- No limit on the number of times membership may be used during the year.
- Accepted by LensCrafters, JCPenney, EyeMasters, Pearle Vision, Sears, Sterling Optical and Target.
- 10% to 30% savings on eye exams and surgical procedures, including LASIK where available.
- Nationwide network of Laser Surgery Centers and independent ophthalmologists. *Vision Benefit is not available to VT residents.



Health Family Discount Plan

DENTAL CARE

- Savings of 15% to 50%* on most dental procedures
- Orthodontics, Periodontics & Endodontics
- Over 76,000 dentists nationwide**
- No limit on the number of visits

**Actual costs and savings vary by provider and geographical area.*

*** According to the Aetna Enterprise Provider Database as of October 1, 2008*

Dental Benefit is not available to VT residents.

Aetna Dental
Access®



Health Family Discount Plan

NURSE HOTLINE

- Toll-free telephone access to experienced registered nurses, 24 hours a day, 365 days a year.
- Answers to questions about prescription and over-the-counter medication usage and interaction.
- Audio health information library with over 100 health-related topics in English and Spanish.
- Services for non-English speaking callers and the hearing impaired.



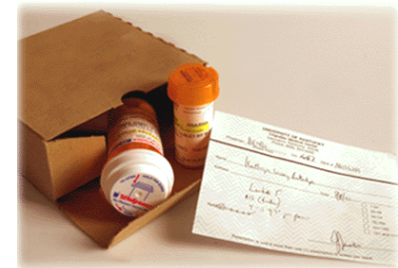
Health Family Discount Plan

NEIGHBORHOOD PHARMACY

- Save 10% to 60% on short term, acute care medications such as antibiotics and pain killers.
- Over 60,000 chain and independent pharmacies nationwide including: Rite-Aid, CVS, Walgreens, Kroger and many more.

Pharmacy discounts are Not Insurance, and are Not Intended as a Substitute for Insurance

The discount is only available at participating pharmacies.



Health Family Discount Plan

MAIL ORDER PHARMACY

- Guaranteed lowest pricing on maintenance medications.
- Prices average 10% below AARP.
- Minimum of \$5 (or 10%) off best local retail price quote – brand or generic over \$10.00 Guaranteed!*
- Open Formulary (includes new and experimental drugs).
- Outstanding quality control.
- Home delivery with no postage or dispensing fees.
- Toll-free number for price quotes and ordering.

**The \$5.00 guaranteed savings cannot be used in conjunction with other discount or insurance cards.*

**Pharmacy discounts are not insurance and are not intended as a substitute for insurance.*

Health Family Discount Plan

HEARING AIDS

Beltone Network

- Over 1,350 Beltone locations nationwide
- Save 15% on over 70 models of Beltone hearing devices.
- Free hearing test.

Mail Order Service

- Over 100 makes and models
- Save 40% to 60% off National Average Retail Pricing
- Free 45-day in-home trial period.
- Low member prices on factory fresh batteries

Health Family Discount Plan

VIP HEALTH & WELLNESS - Vitamins

- Toll-free and online shopping. Choose from brand names you know and trust such as Country Life, Natures Way, Twinlab and Enzymatic Therapy.
- Up to 80% savings on the retail price of over 12,000 products.
- Timely, convenient home delivery of vitamins, supplements and a wide variety of natural health products.
- All purchases include a 30-day unconditional money-back guarantee.



Health Family Discount Plan

IDENTITY THEFT PROTECTION

- Reduced pre-approved credit card offers
- One annual free credit report from 3 major credit bureaus
- LifeLock Identity Alert™ System – provides early notification by email, postal mail, and/or phone whenever they detect your personal information being used to apply for many forms of credit or services
- A \$1 million service guarantee

Life Style Protection Plans



ROADSIDE ASSISTANCE

- Up to 15 miles towing (up to \$80 retail value) per occurrence maximum for covered charges
- Available 24 hours a day, 365 days a year
- Covers Member, spouse and dependent children up to age 21 permanently residing at registered address when driving any vehicles they own or lease (12 months or longer)
- Towing Assistance
- Flat Tire Assistance
- Fuel, Oil, Fluid and Water Delivery Service
- Lock-out Assistance
- Battery Assistance
- Collision Assistance



Life Style Protection Plans

EMERGENCY TRAVEL ASSISTANCE

- Emergency Evacuation/Repatriation
- Family Visitation (Transport and Accommodations)
- Minor Children Return/Escort
- Vehicle Return up to \$1,000
- 24 Hour Information Service
- International Medical Referral
- Emergency Legal Assistance
- Insurance Coordination
- Mortal Remains Transport

**Travel Assistance not available to CT, OR, FL and WA residents*

Life Style Protection Plans



EMERGENCY TRAVEL ASSISTANCE cont.

- Medical Monitoring
- Guarantee of Medical Expenses
- Lost Document Service
- Emergency Delivery of Prescription Items
- Emergency Cash Transfer
- Language Assistance

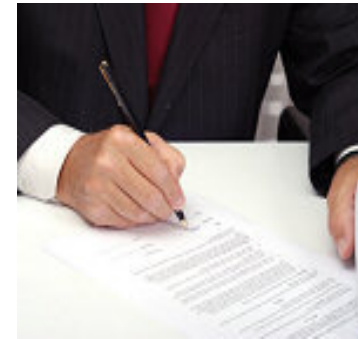


**Travel Assistance not available to OR, CT, FL and WA residents*

Life Style Protection Plans

LEGAL CARE DIRECT

- Nine free services which include:
 - Unlimited initial phone consultations for new legal matters
 - Initial One-on-one consultations for new legal matters
 - Document review (6 pages or less)
 - Letters written on the member's behalf
 - Phone calls made on member's behalf
 - Assistance with governmental programs
 - Assistance with small claims court representation
 - Free simple will with free annual updates
 - Free living will
- Eight commonly used legal services deeply discounted, such as traffic ticket defense, name change, simple divorce, simple trust and more.
- Plan attorneys will either charge \$125.00 per hour, or when appropriate, give members a 40% discount off their usual and customary hourly rate. 10% discount on contingency fees.



*Costs and filing fees additional, specific definitions apply.

Life Style Protection Plans

Life Style Protection Plans

I) Lifestyle Protection Individual Card

Life Lock Individual
Roadside Assistance
Travel Assist
Legal Care Direct

Wholesale cost is \$5.18 **Retail \$7.95**

53% commission or \$2.77 every month

II) Lifestyle Protection Family Card

Life Lock Family
Roadside Assistance
Travel Assist
Legal Care Direct

Wholesale cost is \$7.03 **Retail \$9.95**

41% commission or \$2.92 every month



Health Family Discount Plan

III) Health Family Discount Card

TeleDoc
Dental
Vision
Nurse Hotline

VIP Health & Wellness
Prescription Drugs
Hearing Aids

Wholesale Cost is \$4.75 **Retail \$10.00**

110% commission or \$5.25 monthly recurring



Aetna Dental
Access®



Coast
to
Coast Vision



Premium & Business Family Discount Plans

IV) Premium Family Plan

Includes both Lifestyle Protection
and Health Discount plans

Wholesale Cost is \$11.78

Retail \$16.95

44% commission or \$5.17 every month

V) Business Family Plan - *Minimum 5 enrollments*

Includes both Lifestyle Protection
and Health Discount plans

Wholesale Cost is \$11.78

Retail \$15.95

35% commission or \$4.17 every month



Aetna Dental
Access®



MEMBERSHIP FULFILLMENT



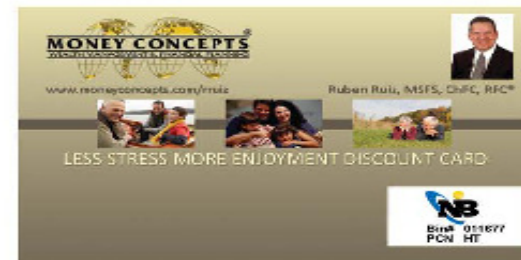
- Full color, plastic laminated membership cards designed to your MC logo, Picture & Website specifications.
- Every member enrolled receives 2 cards
- Full color benefit summary booklets
- Kits include: "Welcome letter", "How to use" benefit information, and Personalized Provider Listings for each member's zip code.
- No pre-printing and no warehousing of inventory!!!

SAMPLE MARKETING PACKAGE

Booklet & Card



Booklet cover design featuring a portrait of Ruben Ruiz, MSFS, ChFC, RFC®. Below the portrait is the website www.moneyconcepts.com/rruiz. A horizontal strip of three photos shows a family, a couple, and an elderly couple. The main text reads "LESS STRESS MORE ENJOYMENT DISCOUNT PROGRAM". At the bottom is the "MONEY CONCEPTS WEALTH MANAGEMENT & FINANCIAL PLANNING" logo.



Discount Card design for "LESS STRESS MORE ENJOYMENT DISCOUNT CARD". It includes the Money Concepts logo, website www.moneyconcepts.com/rruiz, Ruben Ruiz's name and credentials, a photo strip, and the NB logo with "Birt 011677 PCN HT".



Discount Card design for "HEALTH DISCOUNT CARD". It includes the Money Concepts logo, website www.moneyconcepts.com/rruiz, Ruben Ruiz's name and credentials, a photo strip, and the NB logo with "Birt 011677 PCN HT".



Discount Card design for "LIFESTYLE PROTECTION DISCOUNT CARD". It includes the Money Concepts logo, website www.moneyconcepts.com/rruiz, Ruben Ruiz's name and credentials, a photo strip, and the NB logo with "Birt 011677 PCN HT".

MONEY CONCEPTS
FINANCIAL PLANNING CENTER
1920A CORPORATE DRIVE
SUITE 106
SAN MARCOS, TX 78566

← return address
on booklet back

SAMPLE MARKETING PACKAGE

Four Panel Brochure & Application

● SELECT YOUR METHOD OF PAYMENT (check one)

Check / Money Order Enclosed
 VISA MASTERCARD DISCOVER AMEXPRESS
Credit Cardholder _____

Acct # | _____ |

Exp. ____/____/____

Please charge my credit card: Annually Monthly

BANK DRAFT I HEREBY AUTHORIZE New Benefits to initiate funds transfers from the depository financial institution account indicated below and authorize my depository financial institution to honor those transfers. Debit my payment of \$ _____ on the 20th of each month prior to my due date. Please enclose your first two monthly payments and a VOIDED CHECK with this application.

NAME OF ACCOUNT HOLDER: _____

ACCOUNT TYPE: CHECKING SAVINGS

NAME OF BANK: _____

CITY _____ STATE _____ ZIP _____

BRANCH: _____

ABA # (#s at bottom of check)
| _____ |

ACCT#
| _____ |

ADDITIONAL TERMS AND CONDITIONS: To terminate or cancel the member agreement, please call (800) 800-7616 or send a written cancellation notice to New Benefits, 14240 Proton Road, Dallas, Texas, 75244. This agreement can be cancelled for non-payment.

● SIGN HERE _____ (signature required)

Group #: _____ MFS7

Please make checks payable to:
New Benefits • 14240 Proton Rd • Dallas, TX 75244

Disclosures

- * This plan is NOT insurance.
- * This discount card program contains a 30 day cancellation period.
- * FL, LA, MD, ND, OK, SC, SD and TX residents: Member shall receive a full refund of membership fees, excluding registration fee, if membership is cancelled within the first 30 days after the effective date.
- * AR and TN residents: A refund of all fees will be issued if membership is cancelled within the first 30 days.

Not available in KS.

Discount Medical Plan Organization:
New Benefits, Ltd.
14240 Proton Road, Dallas, TX. 75244

MFS7-0909

Rev. 09/09

NOTHING MAKES YOU FEEL BETTER THAN SAVING MONEY

Now you can help offset the high cost of healthcare while keeping your family on the road to good health. You receive significant savings for you and your dependents on healthcare services everyone can use.

These Benefits are:

- Easy to use
- No health restrictions
- Use immediately when you receive your card
- No paperwork

ALL OF THESE BENEFITS ARE AVAILABLE TO YOU AND YOUR FAMILY ON ONE CONVENIENT CARD. This is a discount medical program offering significant savings from thousands of healthcare providers across the nation.

YOUR MEMBERSHIP IS SIMPLE AND EASY TO USE.

You can begin saving money as soon as you receive your membership packet. It's quick and easy to locate participating providers in your area using the toll-free numbers listed on the back of your membership card. Simply present your card at provider locations to receive immediate savings.



WE GUARANTEE YOU WILL BE 100% SATISFIED. If for any reason you are not completely satisfied with your membership, simply return the membership packet within 30 days and your money will be cheerfully refunded.



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(Fax) 208-279-1073
www.moneyconcepts.com/rruiz

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www.moneyconcepts.com/rruiz



LESS STRESS
MORE ENJOYMENT
DISCOUNT PROGRAM



MONEY CONCEPTS
WEALTH MANAGEMENT & FINANCIAL PLANNING


SAMPLE MARKETING PACKAGE

Internet Secure Link

Secure Enrollment - Windows Internet Explorer

https://home.secureenrollment.com/(S(n5boaw55itqwl45vdvs4x55))/step1.aspx?groupnum=mfs78&AID=rubenruiz&source=miQuotes

Secure Enrollment



Step 1. Plan Selection

Step 2. Shipping Information

Step 3. Payment Options

Step 4. Confirmation Page

Discount Medical Plan Application

Select your plan

Please click on the hyperlinks below to learn more about each program. Click on Select once you have decided on a program that best meets your needs.

LIFESTYLE PROTECTION INDIVIDUAL DISCOUNT CARD \$7.95/mo.

Payment Cycle Annually Monthly

- [LifeLock - Individual Membership](#)
- [Nation Safe Drivers Roadside Assistance](#)
- [Travel Assistance](#)
- [Legal Care Direct](#)

Select

LIFESTYLE PROTECTION FAMILY DISCOUNT CARD \$9.95/mo.

Payment Cycle Annually Monthly

- [LifeLock - Family Membership](#)
- [Nation Safe Drivers Roadside Assistance](#)
- [Travel Assistance](#)
- [Legal Care Direct](#)

Select

HEALTH FAMILY DISCOUNT CARD \$10.00/mo.

SAMPLE MARKETING PACKAGE

miQuotes Website

miQuotes - Windows Internet Explorer

https://www.miquotes.com/rubenruiz/index.aspx

miQuotes

MONEY CONCEPTS
BY ASSET MANAGEMENT & INVESTMENT SOLUTIONS

Quality Insurance Options for our Clients and their Families

Sponsored by your Money Concepts Advisor
Ruben Ruiz

For faster service...
Get help from an experienced professional!

Tel: 877-647-8683 Ext.1
rruiz@moneyconcepts.com

Home Life Insurance Discount Benefits Supplemental Health Insurance Agent Log-in

Welcome to the Money Concepts
Personal Insurance Program

This program is designed to supplement your current insurance plans. Feel free to obtain quotes for the products that interest you most. You may request applications totally on-line.

Highlights of the program include

- All plans are individually purchased.
- You own and control the policies.
- Just click on the navigation bar at the top and select the plans that interest you most. You can get quotes and request applications totally on-line.
- All plans are administered by *mi*Quotes, a company recognized for providing excellent customer service and member satisfaction.

Your On-Line Access to Quality Personal Insurance Plans

Join the thousands of people enjoying peace of mind in securing life insurance protection for themselves and their families.

Next Day Coverage

- + Apply completely online
- + No Medical Exam Required
- + Approval based upon answers to a few online health questions
- + Download policy instantly if approved

- [Term Life Insurance](#)
- [Short Term Medical Insurance](#)
- [Student Health Insurance](#)

[FAQs](#) | [Licensing, Disclaimer & Privacy Policy](#)

A 2 year contestable and suicide provision applies on Life insurance contracts in most states. See product details for form number.
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Banking, Credit Union & Association Program

Hypothetical example:

Lifestyle Family Protection Plan - \$9.95/month

\$2.00/month goes to the Organization

Health Family Discount Plan - \$10/month

\$4.00/month goes to the Organization

Premium Family Plan - \$16.95/month

(Includes all of the Lifestyle and Health Discount Benefits!!!)

\$4.00/month goes to the Organization

Each Package has a \$3.95 one-time application fee.

You decide how much commission to share with the organization!

The above numbers are only an example...

Banking, Credit Union & Association Program

Hypothetical example:

(Organization has 10,000 members enrolling 5% of membership annually for 3 years)

1st year

Organization enrolls 500 members (5%) for the Health Discount Card

$500 \times \$4 = \$2,000/\text{month}$ or **\$12,000 annually**

2nd year

Organization enrolls 500 new members (5%) for the Health Discount Card

$1000 \times \$4 = \$4000/\text{month}$ or **\$48,000 annually**

3rd year

Organization enrolls 500 more new members for the Health Discount Card

$1500 \times \$4 = \$6,000/\text{month}$ or **\$72,000 annually**

After 3 years with a 85% member retention rate.

Your organization could receive over \$60,000 in annual commissions every year with more opportunities to grow!!!

Fundraising Program

Hypothetical example:

Lifestyle Family Protection Plan - \$9.95/month

\$2.00/month goes to the non-profit or organization

Health Family Discount Plan - \$10/month

\$4.00/month goes to the non-profit or organization

Premium Family Plan - \$16.95/month

(Includes all of the Lifestyle and Health Benefits!!!)

\$4.00/month goes to the non-profit or organization

Each Package has a \$3.95 one-time application fee.

You decide how much commission to share with the organization!

The above numbers are only an example...

Fundraising Program

Hypothetical example:

(Non-Profit has 30 fundraisers enrolling just 2 cards annually for 3 years)

1st year

Non-Profit enrolls 60 members for the Lifestyle Card

60 x \$2 = \$120/month or **\$1,440 annually**

2nd year

Non-Profit enrolls 60 new members for the Lifestyle Card

120 x \$2 = \$240/month or **\$2,880 annually**

3rd year

Non-Profit enrolls 60 more new members for the Lifestyle Card

180 x \$2 = \$360/month or **\$4,320 annually**

After 3 years with a 85% member retention rate.

**Your organization could receive \$3,600 in annual donations
every year with more opportunities to grow!!!**

Group Organization Start-Up

- Work closely with your Money Concept Advisor to coordinate a marketing plan for success!
- Signed Letter of Understanding from organization/group to receive donations or commissions
- \$50 per organization/group set-up fee. No pre-printing or inventory costs to your organization!
- Co-Branded Money Concepts template at no-charge to add your organizational name & logo
- Secure link provided to organizations/groups for electronic applications
- Customized brochure (4 panel) with registration form (\$.45 each, minimum 100)
- Optional - \$2.50 per John Q sample kit (Includes Card & Booklet) for enrollment point of sale

Advisor Testimonials

"The company New Benefits in tandem with Money Concepts & Marketing Financial have introduced a tremendous value for my clientele. The presentation at the New Benefits headquarters proved a first class operation and value proposition. I'll be traveling to South Africa this month and the Travel Assist benefit that offers emergency medical evacuation and return of dependent children provides real peace of mind." **Tony Dubois, President Money Concepts**

"I am currently introducing a new service package. Identity theft is on the rise and should be a concern for all of us. One of the foremost vendors for identity theft protection is LifeLock. We are offering a tremendous value plan and hope that you will see this as one way I can help you protect your financial world." **Nick Hodges, Money Concepts Regional Director**

"The new Money Concepts Family Discount Card was a fantastic meeting and we had a great time learning about the company New Benefits. It was a wise decision to have our regional meeting at their Head Quarters and tour the operation. It displayed the opportunity was very real! The Discount Cards do work and it made the MC Associates really believe & understand what they have their hands on, first, before the rest of those slow-moving MC Associates. 10 cards sold, 999,990 to go...."
"Ruben Ruiz, Money Concepts Regional Director



Special Premium Family Card Offer!

Exclusive to Money Concept Advisors & Staff

Premium Family Plan

TeleDoc
Dental
Vision
Nurse Hotline
Hearing Aids
VIP Health
& Wellness

Life Lock Family
Roadside Assistance
Travel Assist
Legal Care Direct
Prescription Drugs



Your Monthly Cost \$10.00!!!

Just the Individual Life Lock Identity Theft Protection retails for \$10 a month. Why not protect your entire family for the same cost! With so much more!!!

Aetna Dental
Access®



Coast
to
Coast Vision



How Do I Get Started?!!!

- Contact Marketing Financial
@ 800.677.1087
- Enroll your own advisor card
- Complete group setup form
- One time \$50 setup fee
- Attach Picture for booklet/card
- Order Marketing Materials
- License miQuotes Website
(not required)



Money Concepts Group Set-up*

Please note: There is a one-time group set up fee of \$50 that provides the card/booklet customization, internet link for enrollment & the customized brochure.

- First and Last Name - _____ (required)
- Address, City, State, Zip - _____ (required)
- Phone - ____ - ____ - ____ (required)
- Email - _____ (required)
- Fax - ____ - ____ - ____ (not required)
- Website for the Brochures: _____ (required)
- Phone number to refer members to if they have questions about other products you offer: _____ (required)
- Will you be offering MiQuotes? ____ Yes or No

New Benefits will administer any billing, refund, cancellations and or questions about the benefits.

Credit Card Information for \$50.00 Group Set up Fee

Name on the Card: _____ (required)
 Credit Card Type: Select One (required)
 Credit Card Number: _____ - _____ - _____ - _____ (required)
 Expiration Date: ____/____/____ (required)

Required Materials for Group Set up:

- Please attach a picture for the Cover of the Booklet/Card with this Form
- Please see the Marketing Order Form to order Fulfillment Samples and Brochures after your group is activated.

Please note: The second business plan application is an opportunity for you to sign up an entire company's employees for a discounted rate, with a minimum of 5 or more employees. After the first employer group, there is an additional \$50.00 group set up fee.

*The only additional change from the agreed upon Money Concepts Template Group is the picture, website and name. Group Set up is 2-4 weeks from date the attached is received by lcollins@newbenefits.com.

Please see Marketing Order Form to Order the below Materials

Brochure Cost - \$00.45 (minimum 100)
 Complete Sample Kit Cost - \$2.50
 Booklet - \$1.50
 Card - \$1.00

Please indicate Shipping Method on the form.



Contact Marketing Financial @ 800.677.1087 for More Information!

MARKETING ★
FINANCIAL

new benefits⁺
creating advantage.