

# The Comprehensive Financial Planning System™

## T & M Financial, Inc. Associate Planner Contract Selection Form

**Brokers Personal History Form completed and enclosed**

If you wish to submit insurance or securities business through companies which list us as your general agent instead of paying our monthly users fee, please complete the enclosed Broker's Personal History Form and indicate below which companies you wish to use.

Our \$10,000 minimum annual commission requirement may be met by combining production from any of the companies listed below. Contract kits for the companies you select will be sent to you by return mail. CFPS initial supplies will be sent to you when you complete and return the required paperwork to us.

to receive contract kit

Company	Primary Products Used in the CFPS	First Year Commission Rates*	Eligible for ** T & M Bonus?										
<input type="checkbox"/> <b>Assurity Life/Security Financial</b> (Requires insurance license)  Do you prefer annualized commission? <u>Yes/No</u>	Whole life Universal life Term insurance Disability insurance Fixed annuities Long Term Care	90% of base premium 90% of target premium 90% excluding policy fee 60% of total premium 5.5% under age 71 40% to 85%	Yes										
<input type="checkbox"/> <b>Tandem Securities, Inc.</b>	Variable Annuities Variable Life Mutual Funds	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">Last 12 <u>Months GDC</u></td> <td style="text-align: center;">Payout <u>Percent</u></td> </tr> <tr> <td style="text-align: center;">\$0-50,000</td> <td style="text-align: center;">60%</td> </tr> <tr> <td style="text-align: center;">50,001-75,000</td> <td style="text-align: center;">65%</td> </tr> <tr> <td style="text-align: center;">75,001-100,000</td> <td style="text-align: center;">70%</td> </tr> <tr> <td style="text-align: center;">100,001 and up</td> <td style="text-align: center;">75%</td> </tr> </table>	Last 12 <u>Months GDC</u>	Payout <u>Percent</u>	\$0-50,000	60%	50,001-75,000	65%	75,001-100,000	70%	100,001 and up	75%	Yes
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\* Commission rates shown may vary with age and are subject to change.

\*\* T & M Financial, Inc. currently pays an annual bonus of up to 20% on first year commissions over \$10,000 per year per associate for all planners in your group. This bonus program may be changed or modified at any time without notice.

<input type="checkbox"/> <b>Material</b>	<u>Cost Per Item</u>	<u>Quantity Desired</u>	<u>Total Cost</u>
<input type="checkbox"/> Please send me the <b>CFPS 26 hour DVD</b> training videos and the <b>CFPS Training Workbook</b>	\$240	_____	\$ _____
<input type="checkbox"/> Please send me the <b>CFPS Recruiting Kit</b>	\$40	_____	\$ _____
		Total Cost	\$ <span style="border: 1px solid black; display: inline-block; width: 60px; height: 20px; vertical-align: middle;"></span>
<input type="checkbox"/> Enclosed is my check payable to <b>T &amp; M Financial, Inc.</b> for the material selected or <input type="checkbox"/> Please charge my credit card listed below for the material selected			
<input type="checkbox"/> Mastercard    Name on Card _____		Billing Address	
<input type="checkbox"/> Visa            Card No. _____ -- _____ -- _____		Street _____	
<input type="checkbox"/> Discover        Expiration Date ____/____/____		City _____	
<input type="checkbox"/> Am. Express    Signature _____		State _____ Zip _____	

Your Name \_\_\_\_\_ Mailing Address \_\_\_\_\_

Company Name \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_