



Business Card Request Form – MoneyBlock Design

Please provide the information requested below to order MoneyBlock-designed business cards. MoneyBlock can print these cards for you or supply you with artwork you can then provide to your own print vendor. (If you would like to use your own design and print vendor please review instructions and requirements on page 3.)

When completing the following information for your MoneyBlock cards, please note the following:

- If you list an e-mail address on your business card, it must be a MoneyBlock provided e-mail address such as bjohnson@moneyblock.com.
- If you list a fax number on your business card you must maintain copies of all incoming and outgoing faxes at your location. In addition, you must forward copies of outgoing faxes to your branch supervisor for review and approval prior to first use.

Name: _____

Title: ☐ Registered Representative ☐ Financial Planner
☐ Financial Advisor ☐ Stockbroker
☐ Other: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: (____) ____ - _____ **Toll Free (if applicable):** (____) ____ - _____

Fax: (____) ____ - _____ ☐ None

E-mail: ☐ MoneyBlock Email ☐ None ☐ Other: _____

Service Requested:

- ☐ **Design Only** - MoneyBlock will design your business card using the above information and the design template shown on Page 2. You will receive final artwork to provide to your own printer.
- ☐ **Design and Print** - MoneyBlock will design and print your business cards using the above information and the design template shown on page 2. (Printing will be billed at cost.)

Choose quantity to be printed: ☐ 500 ☐ 1000

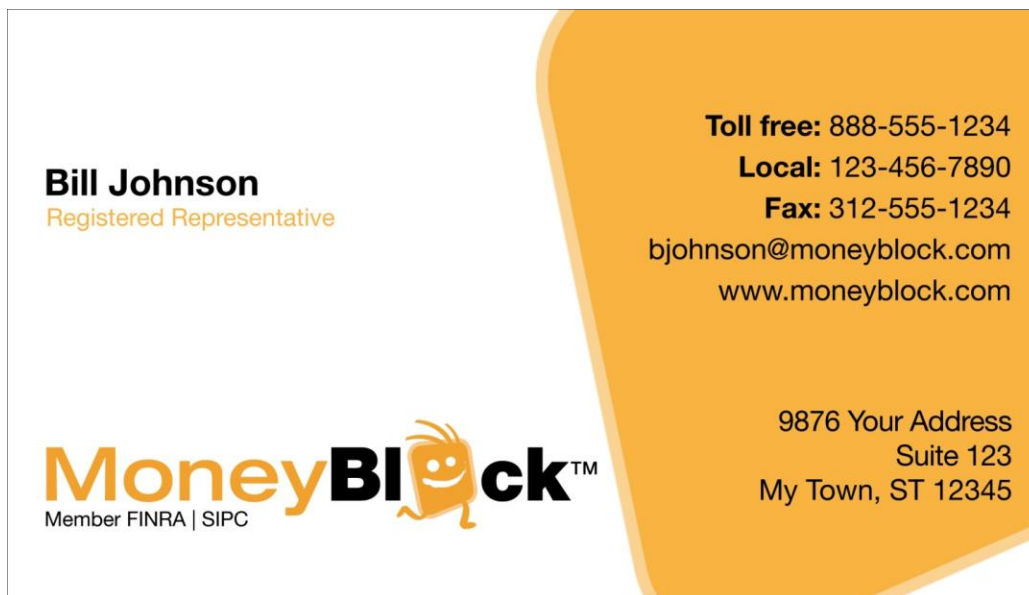
Ship cards to:

- ☐ Address Above
- ☐ Different Address: _____

Please submit your form via email to compliance@moneyblock.com or fax to 312-253-376.



Sample Business Card - Front



Sample Business Card - Back





Business Card – Requirements If Using Your Own Design/Vendor

You are more than welcome to use your own business card design and vendor if you prefer. Please choose the scenario that applies to your situation.

Instructions for printing business cards if doing business as a MoneyBlock representative:

- If you list an e-mail address on your business card, it must be a MoneyBlock provided e-mail address such as bjohnson@moneyblock.com.
- If you list a fax number on your business card you must maintain copies of all incoming and outgoing faxes at your location. In addition, you must forward copies of outgoing faxes to your branch supervisor for review and approval prior to first use.
- The business card must list MoneyBlock's corporate office in plain view:

Corporate Office: 311 S. Wacker Drive • Suite 1775 • Chicago, Illinois 60606
Member FINRA | SIPC • www.moneyblock.com • 800-591-8243
- Compliance must receive a copy of the proof and must approve your design before you print the business cards.

Instructions for printing if doing business as an alternate entity or DBA, such as "Johnson Financial Planning Services":

- If you list an e-mail address on your business card, it must be a MoneyBlock provided e-mail address such as bjohnson@moneyblock.com.
- If you list a fax number on your business card you must maintain copies of all incoming and outgoing faxes at your location. In addition, you must forward copies of outgoing faxes to your branch supervisor for review and approval prior to first use.
- The business card must list MoneyBlock's corporate office in plain view:

Corporate Office: 311 S. Wacker Drive • Suite 1775 • Chicago, Illinois 60606
Member FINRA | SIPC • www.moneyblock.com • 800-591-8243
- If you are doing business as an alternate entity such as "Johnson Financial Planning Services", your business card must have the following phrase in plain view:

Securities offered through AOS, Inc. doing business as MoneyBlock. Member FINRA/SIPC

- It is important that the MoneyBlock information is not confused with your DBA information. A good example of how this can be achieved is by placing the following at the bottom of your business card separate from your DBA information:

Securities offered through AOS, Inc. doing business as MoneyBlock. Member FINRA/SIPC
Corporate Office: 311 S. Wacker Drive • Suite 1775 • Chicago, Illinois 60606
www.moneyblock.com • 800-591-8243

- Compliance must receive a copy of the proof and must approve your design before you print the business cards.



Sample Business Card

Johnson's Financial Planning Services

Bill Johnson
Financial Planner

9876 Your Address, Suite 123
My Town, ST 12345

Phone: 888-555-1234
Fax: 312-555-1234
bjohnson@moneyblock.com

Securities offered through AOS, Inc. doing business as MoneyBlock. Member of FINRASIPC
Corporate Office: 311 S. Wacker Drive • Suite 1775 • Chicago, Illinois 60606
www.moneyblock.com • 800-591-8243