

## How to set up your video for your prospects and clients

It will take you about 10 minutes to assemble and send us the information we need to create your professional-looking intro and outro for your advisor video newsletter. These will be the first and last 10 seconds of your video and give your videos a professional look. You will choose the graphics and music from our library. Just follow the steps below.

Contact: [neal@advisor-video.com](mailto:neal@advisor-video.com) for assistance

Here is a sample of what your finished intro/outro might look & sound like:

<https://app.screencast.com/uxZeLw9FgF3L5?tab=Details&conversation=sNjnN2pgj8YkHZjSctavte>

### Step 1:

Click this link below to view choices for your video design. Then select your video design from the dropdown list the video design you like:

<https://app.screencast.com/collections/g000300BDJJAal0ivfGZFKfO1ykr>

Select Video Design ▼

### Step 2:

Click this link to hear the music choices for your video. Then select your music choice from the dropdown list:

<https://app.screencast.com/collections/g000300Gma83yG0aZwO9Rjytib0iS>

Select Audio Choice ▼

### Step 3:

We need some information in order to build out your intro/outro

Enter Your Business information below

Here's an example. We need the information to create this panel



How you want your name to appear. For example: Joe Advisor, CFP®.

Your Name - Panel1

**We can add your picture or your logo (not both). Do you want your picture or logo to appear opposite your name as you see above?**

- yes
- no

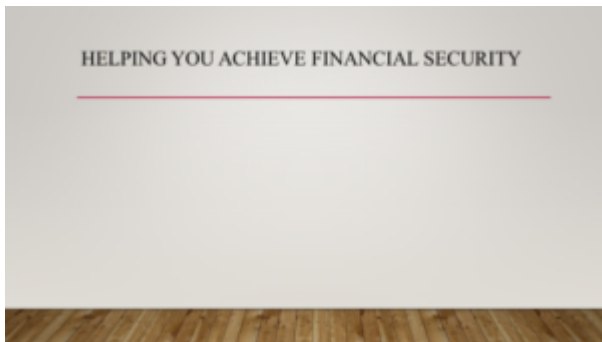
**If you want your picture or logo to appear, upload it here**

**Allowed file types: jpg, jpeg, jpe,gif, png, pdf**

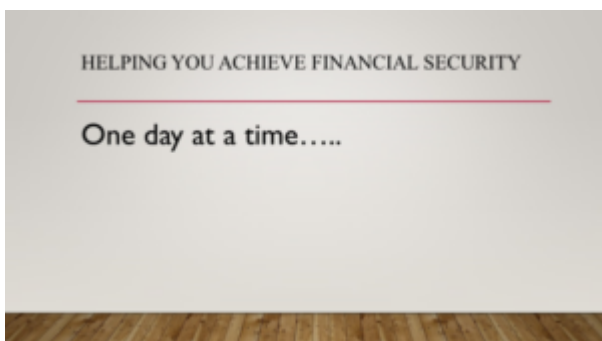
**maximum size = 2 MB**

**(If your file is larger than 2 MB, shrink it here <https://www.img2go.com/compress-image>)**

**What tag line do you want to use for your second slide --see the image below (example: Helping you achieve financial security)**



**If you want to have a second sentence for your tag line, what is it? If none, please say "none" (example: One day at a time) See image below**



**Do you have artwork with your company name that you would like to use? See the panel below**





**If you have existing artwork, upload it here**

**allowed file types jpg, jpeg, jpe,gif, png, pdf, maximum size = 2 MB**

**(if your file is larger than 2 MB, shrink it here <https://www.img2go.com/compress-image>)**

**upload artwork**

**If you do not have artwork, enter your company name**

**Next, we need additional information to complete the panel below with your contact information**



**Business phone:**

**Business email:**

**What happens next:**

We take your information and we will create your personalized intro and outro for your video.

Then, after you sign below, you will be redirected to a page for payment. The subscription is \$79/month, cancel anytime.

After you make payment, you will be directed to a page with instructions on how to create and distribute your video from A to Z. We will also email you a link to that page. Each instructional video is about 3 to 6 minutes long. In less than an hour, you should be ready to go. You will learn:

1. How to easily record yourself on audio and video delivering the video newsletter (we will send you a fresh message each month).



2. How to use a simple and free software tool to combine the video intro and outro design we create for you and your recorded message.
3. How to use a simple and free tool to upload your video to the web, and get a link that you can email to your prospects and clients (we will provide the email message for you).
4. How to best distribute your monthly video newsletter to your clients and prospects.

Please allow a few days for the creation of your intro and outro video clips. We will email it to you when completed. Once you sign this document, you will be redirected to the payment page.

Add any notes here:

Please sign below (and press the blue button in lower right after you sign). If you have not completed all fields above, then you will not be able to sign and there will be red indicator above of the missing information.

You agree to the following: The above information is for creation of the intro and outro for my monthly client video. If I want to change the above information once we start your intro and outro, there is a charge of \$75."

## Questions?

Please email us  
neal at advisor-video dot com

X \_\_\_\_\_

# Signature Certificate

Document name: Account Setup

Unique Document ID: 867741E2CC6937FA812AA49D41C81EB06F522513

LEGALLY SIGNED USING  
**WP**Signature  
Build. Track. Sign Contracts.

## Timestamp

## Audit

May 14, 2020 1:40 pm PDT	Account Setup Uploaded by Neal Frankle - neal@advisor-video.com IP 73.252.165.197
May 14, 2020 1:49 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 24.5.135.88, 172.68.143.79
May 14, 2020 2:13 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 24.5.135.88, 172.68.143.79
May 15, 2020 10:57 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 24.5.135.88, 172.68.143.187
May 26, 2020 8:06 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 24.5.135.88, 172.68.132.216
July 26, 2023 9:28 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.69.111
July 26, 2023 9:58 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.69.111
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July 26, 2023 10:40 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.69.111
August 1, 2023 2:53 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.69.111
August 1, 2023 3:03 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.69.111
August 23, 2023 7:43 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 23, 2023 7:45 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 23, 2023 7:54 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 23, 2023 8:07 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227

August 23, 2023 8:12 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 23, 2023 2:25 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 24, 2023 9:01 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.70.99.227
August 28, 2023 2:00 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 29, 2023 11:48 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 29, 2023 11:55 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 30, 2023 11:41 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 30, 2023 11:44 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 30, 2023 11:46 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 30, 2023 11:49 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
August 30, 2023 11:53 am PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.71.68.4
February 20, 2024 1:39 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 1:42 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 1:51 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 1:52 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 2:10 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 2:11 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197
February 20, 2024 2:14 pm PDT	Neal Frankle - neal@advisor-video.com added by Neal Frankle - neal@advisor-video.com as a CC'd Recipient Ip: 73.252.165.197

February 20, 2024 2:15 pm  
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February 21, 2024 10:03 am  
PDT

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February 22, 2024 9:31 am  
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February 22, 2024 9:33 am  
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February 22, 2024 9:37 am  
PDT

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This audit trail report provides a detailed record of the online activity and events recorded for this contract.

Page 7 of 7