

BetaVest CASE Management System Instructions for Client Brochures

This document lists the procedure and details for inserting your logo into the BetaVest CASE Management System Client Brochures and how the brochures will be delivered.

Acceptable Formats for Logos

To insert the logo into the brochure the best way possible, BetaVest will need a digital, print-ready version of the logo. The following formats are recommended:

- Adobe Illustrator (*.ai) vector-based format
- Vector-based EPS
- Vector-based PDF

All other formats, such as JPG, BMP, etc. will work but please be aware there will be a significant loss in quality with the finished product when using these formats. If you do not have a vector-based format, please consult with the company who originally produced/designed your logo and they will most likely have one on file.

Logo Delivery Procedure

If your logo contains fonts, try and make sure they are converted to path. If you are unable to do this, please include any fonts that were used when the logo was created, as BetaVest might not have your particular font on file. All artwork and font files can be sent as an email attachment to the following address:

logos@betavest.com

Please be aware that email attachments are limited up to 5 MB. If your artwork is larger in size, please contact BetaVest Support for additional help.

Please include your contact information in the email. Also, if necessary, please provide the name of your Broker Dealer in the email as well. For compliance reasons, your Broker Dealer may require the following wording to be included in the Logo Image:

Securities Offered Through: <Broker Dealer Name> Member NASD/SIPC

For your logo to be completed in a timely fashion, BetaVest recommends the logo image file be named as your company. (For instance, the BetaVest logo filename would be "betavest.eps") This will help us to determine whose artwork we are handling due to the large number of logo requests we are receiving.

Client Brochure Delivery

Please allow 5-10 business days for your brochure to be completed. Once it is complete, BetaVest will ship a CD containing your personalized Client Brochure via UPS. You will receive an email with a tracking number once the order has shipped. To print, all you will need to do is take the CD to your local printing company (i.e. Kinko's), and have them print it. The file is print-ready and nothing else is required on your part. (Please be aware BetaVest is not responsible for the costs of printing) BetaVest recommends the brochure to be printed on 11x17, 2-Sided Glossy-Text Paper (the files are set up with an 1/8" bleed). The printing company should also fold the brochures for you, if requested.

If you have any questions about this process, please contact BetaVest Support at 866-972-5680 or at support@betavest.com.