

BetaVest CASE Management System Instructions for Private Labeling

This document lists the procedure and details for inserting your logo into the BetaVest CASE Management System software, reports and multimedia presentation.

The cost of Logo insertion is \$300 that can be paid by check (by mail) or credit card (online).

Acceptable Formats for Logos

To brand the software, 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.

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.

Please allow 5-10 business days for your private labeling to be completed. Once it is complete, an email will be sent out to your address on file. The email will contain a link that will prompt you to download your Logo Installer Package. This installer, once run, will insert the logos into the software. Please keep this link on file because if you ever update your CASE Management System it will overwrite your logos and you will need to run your Logo Installer again.

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