

# AllocationMaster™

Asset Allocation Software  
2010 Order Form

## TO ORDER

**Mail:** SunGard® Expert Solutions  
P.O. Box 47140  
Jacksonville, FL 32247-7140

**Fax:** (904) 399-0519 **NO TELEPHONE ORDERS ACCEPTED.**

## SHIPPING INFORMATION

**Name:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

**Firm:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **Floor/Suite:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Telephone:** (\_\_\_\_) \_\_\_\_\_ **Fax:** (\_\_\_\_) \_\_\_\_\_

## PAYMENT INFORMATION

**Payment By:**  Check (Payable to SunGard Expert Solutions) Initial License Fee: \$495.00  
 VISA Applicable state and county sales taxes will be assessed  
 MasterCard for ALL states EXCEPT AK, DE, MT, NH, and OR.  
 American Express Offer Expires 12/31/10

**Account Number:**

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**Expiration Date:**

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**Signature (Required):**

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## PLEASE READ CAREFULLY

The initial license fee for AllocationMaster™ is \$495.00. A quarterly update fee of \$99.00 will be billed at the beginning of each calendar quarter. Update fees will begin with the next calendar quarter. Payment of the quarterly update fee is required to continue use of the program. If payment of the quarterly update fee is not received, use of the software will expire and your account will be cancelled. To reactivate your account once it is cancelled, it will be necessary to pay for all unpaid quarterly update fees. No free trials or refunds on used or installed software. Two installations are permitted. **No rush orders.** Please allow 7 to 10 working days to receive your order. If you have any questions about AllocationMaster™, please call the Client Services line at (801) 955-0705. We are available to assist you Monday through Friday from 7:00 a.m. to 4:00 p.m., Mountain Time.

AllocationMaster™ is licensed subject to the terms and conditions of the Software License Agreement included with the initial shipment of the AllocationMaster™ software. By installing AllocationMaster™ on your computer, you accept the terms and conditions of the Software License Agreement. If you do not accept the terms and conditions of the Software License Agreement, you must return the software and all other materials provided by SunGard Expert Solutions at your expense.

**Do you want the quarterly payment amount automatically debited from your credit card each calendar quarter?**

Yes \_\_\_\_\_ No \_\_\_\_\_

**We request that you provide written notice 30 days prior to the beginning of the quarter if you elect to cancel this option**

**Do you want to receive AllocationMaster Updates by download from [www.allocationmaster.com](http://www.allocationmaster.com) only** Yes \_\_\_\_\_ No \_\_\_\_\_