
J.P. Oltmann

Texas Society of Enrolled Agents Members,

Thank you for expressing interest in these videos. I'm glad that they are helping your society and its members gain visibility around Enrolled Agents and the Enrolled Agent credential.

To order a video email the following items to admin@jpoea.com*
This form signed (Page 1-this page)

- The order info page signed and filled out (Page 2 – Order Info).
- A signed copy of the Credit Card form (Page 3 – CC form)
- A digital copy of your logo with a transparent* background

*If you have issues scanning you may send the form to our secure fax at 339-499-7542. If you fax the form please email admin@jpoea.com indicating the date, time, and number you faxed from so we can easily locate your order form. Failure to do this may result in processing delays.

**If you cannot provide a transparent copy the work can be completed for an additional 15 dollars.

**Please note that white is not necessarily transparent

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Scope of Work

-At the finish of this engagement your will be provided a custom copy of the "EA Explainer Video" either branded solely for your business or co-branded for your business with the Texas Society of Enrolled Agents.

-If additional changes are required after production you may incur additional change fees up and to the amount of the full price of the video.

-Orders will be received for 60 calendar days starting on 10/24/2018 and ending on 12/23/2018 . After which no further orders will be received.

-After orders have stopped the materials will be delivered to the designer. Please allow 4 weeks from 1/7/2018 for the designer to complete their work.

Signature

Date

J.P. Oltmann

Order Information

- I would like a copy of the Texas NAEA co-branded video
- I would like a copy of the video without Texas NAEA co-branding

Information for all Videos

Website Address: www._____. *

Phone Number: _____

(Phone numbers will be in a the 555-555-5555 format)

Font Style: _____

(The default font will match the Texas NAEA branding guidelines or be a generic font such as Times New Roman)

Font Color: _____

(Please provide a HEX, RGB, or RGBA code or a digital color sample. The default font color will be black or match the Texas NAEA branding guidelines.)

Additional Information for videos without a logo

Name & Credentials _____ *

*Please be aware that while there is no hard limit on length space constraints long names and websites may need to be shortened or shrunk to fit.

I acknowledge that any changes after submission of this form may lead to additional charges. In addition, I have checked the information I have provided for errors and understand that any errors stemming from incorrect information provided here may required additional charges to correct.

Signature

Date

Payment Authorization Form

Please return this completed form with a scanned voided check.

We hereby authorize J.P. Oltmann (Fidelis Advisers LLC) to initiate debit entries to our account at the financial institution named below for the purpose of paying fees for the engagement described in this order form.

[\$ 50] once on _____ for the purchase of a Texas NAEA co-branded video or [\$ 67] should I provide a copy of my logo without a transparent background.

An additional [\$ 15] for the purchase of a video and the modifications necessary to create a logo with a transparent background.

An additional [\$ 10] for the purchase of a branded video, without Texas NAEA cobranding (Txsea negotiated a bulk order price.)

We understand that if the funds are not available at the time of the transfer, we will receive notification from J.P. Oltmann (Fidelis Advisers LLC) that the transfer could not be completed. We will then bring current the total amount due over the phone.

Further, we agree not to hold J.P. Oltmann (Fidelis Advisers LLC) responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution.

This agreement will remain in effect until we receive written notification of cancellation from you at the email address admin@jpoea.com with the subject line written as Credit Card CANCELLATION. The notice of cancellation must be received in such time and in such manner as to allow sufficient time for processing.

Cardholder Name:

Exp Date: _____

Credit Card #

Security Code:

Billing Address and Zip Code

Signature

Date