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PDI GLOBAL

INTEGRATED MARKETING AND CLIENT
COMMUNICATION SOLUTIONS FOR YOUR LAW PRACTICE



THOMSON REUTERS™

BUILD YOUR SUCCESS

PUT OUR THOUGHT LEADERSHIP TOOLS TO WORK FOR YOUR FIRM

How do you build and maintain strong, profitable relationships with clients, prospects and referral sources? By sharing engaging, relevant and valuable information that positions you as a thought leader and an expert on the topics discussed. And how can you efficiently do this? With PDI Global's marketing and client communication solutions.

CHOICE. QUALITY. VALUE.

For more than 30 years, PDI Global — now part of Thomson Reuters — has been a leader in helping law firms increase market visibility, enhance brand awareness and achieve their business development and client retention objectives. Our goal is to help you get ahead by providing you with communication tools and services of the highest quality and value.

To this end, we offer a variety of electronic and print communication solutions:

- **Private-label marketing newsletter programs** for important practice areas in email, online and print formats — page 3
- **Client tax planning guide** in online, email and print formats — page 6
- **Client estate planning guide** in print and PDF formats — page 8
- **PowerPoint® tax planning and estate planning seminar presentations** — page 9
- **Online Content Store** with thousands of articles on law, tax, business and industry subjects — page 10
- **Tax Alerts** on timely topics and important developments — page 10
- **Editorial, design and copywriting services** for collateral, websites, promotional materials and custom newsletters — page 11

This variety allows you to integrate print and electronic communications in a way that matches medium and message with audience, purpose and recipient preferences. As a result, you not only maximize reach, impact and cost-effectiveness; you save time and effort, too.

We invite you to review this brochure to see how we can help you achieve your marketing and client communication objectives. Then visit us at pdiglobal.com or call us at 800-227-0498 — and start turning more of your potential into profit.

PRIVATE-LABEL NICHE MARKETING NEWSLETTERS

Looking for an easy, cost-effective way to regularly keep in touch with clients, prospects and referral sources? A communication tool that not only builds awareness of your brand but also differentiates you from competitors, positions you as a thought leader and facilitates business development?

PDI Global's niche marketing newsletters give you this — and more. They save you time, effort and money, and they always go out, even when you're too busy to produce one.

Plus, they're available for major practice areas in email, online and print formats. This means you can deliver your message the way recipients prefer and thereby maximize reach, impact and return on investment. And our newsletters are available on an exclusive basis in specific markets, so recipients won't get the same publication from your competitors.

BRAND-ENHANCING, WORRY-FREE COMMUNICATION

All formats feature eye-catching designs you can brand with your logo and customize with other information, such as a firm description or additional content. And all contain professionally written articles on topics suggested by a National Editorial Board.

Also, every article is reviewed by experts for technical accuracy and carefully proofread prior to publication. Bottom line: You don't have to worry about quality.

TITLES FOR MANY NICHES

We offer bimonthly newsletter programs for important practice areas:

- *Employee Benefits Update*
- *Employment Law Briefing*
- *Ideas in Intellectual Property Law*
- *Insight on Estate Planning*
- *Merger & Acquisition Focus*
- *Planning for Prosperity* (personal financial planning)
- *Tax Impact* (tax and personal financial planning)
- *The Estate Planner*

For an additional charge, we can customize your newsletter with the content, title and/or design you want. We can also create and produce an entirely custom newsletter using your content or articles we provide or write for you.

VALUABLE EXTRAS

With your subscription, you get free access to your newsletter's article library through our online **Content Store**. By exponentially increasing the amount of content you can search through, download, edit and use as you like, this extra benefit greatly increases the value of your subscription.

In addition, you'll receive by email **Tax Law Change Updates** that summarize major tax acts. Modify the updates as you wish to email to clients and contacts, post on your website or include in your newsletter and other communications.



NEWSLETTER FORMATS

EMAIL

Our **Flex-E-letter** option gives you a highly flexible and cost-effective marketing and client communication tool. This advanced email newsletter program features a customizable HTML template that allows you to:

- Insert your logo, bylines, links, photos, event information, a welcome message and news about your firm or a development of interest to readers
- Change the title, images, colors, headlines and articles — or add your own articles
- Create separate editions with content customized to particular audiences or to distribute your newsletter more frequently

Each **Flex-E-letter** issue is preloaded with timely articles on topics relating to the niche involved. However, you can add or substitute articles from your newsletter library, our

online **Content Store** or your own sources. Article summaries on the template link to the full story in HTML format.

Plus, **Flex-E-letter** comes with our **Flex-E-mail** e-communication system, which features sophisticated email distribution, list management, tracking and report-generation technology. See which emails bounced and why, which were opened, and who clicked on which links to identify reader interests and service needs. And manage all of your email lists — not just your newsletter's — on a password-protected server that provides maximum security, privacy and control.

Flex-E-mail also gives you dozens of other email templates — as well as the ability to create your own — that you can use for your newsletter or other communications. API integration with your other databases is available, too.

To make it easy for recipients to share your content with their contacts, you can

add “Share-to-Social” and “Forward to a Friend” buttons to each email. And **Flex-E-letter's** “View to Mobile” capability means your newsletter will look just as good on a smartphone or tablet as it does on a computer. If you like, you can also post the newsletter on your website and create a link that connects visitors to a customizable signup page for subscribing to your email newsletter.

ONLINE

With **PDF Link**, you get an electronic newsletter customized with your logo and other information and ready to post on your website. You also get text you can email to your contacts that links to the PDF, highlights the topics covered and encourages recipients to view the newsletter.

Because **PDF Link** has the same layout as the print version, it features reader-friendly columns, strong branding, and supportive imagery throughout.

The screenshot shows a newsletter template for "The Estate Planner" dated November/December 2011. The header includes the title "The ESTATE PLANNER" and contact information placeholders: "[insert your firm logo]", "[your firm address]", "[your firm phone]", and "[your firm website address]". The main content area features three articles, each with a photo and a "Full Article" link. Callout boxes with arrows point to various customizable elements:

- CHANGE THE TITLE AND COLORS AS YOU LIKE**: Points to the header area.
- INSERT YOUR FIRM'S LOGO AND CONTACT INFO**: Points to the logo and contact placeholders.
- ADD PARTNER BYLINES**: Points to the byline area of the first article.
- INSERT CUSTOM ARTICLES AND PHOTOS**: Points to the article content area.
- ADD A MESSAGE OR INFO ABOUT YOUR FIRM**: Points to a sidebar area labeled "[insert firm-specific information or key firm news in this area]".

Flex-E-letter's fully customizable template enables you to give your e-newsletter the look and content you want.

PRINT

The tangibility of print newsletters enables you to make a strong impression on recipients. Their portability and spread-layout design facilitate reading. Their durability or "shelf-life" makes it more likely that they'll be kept and read. And they're great to hand out at conferences and meetings, include in proposals or display in your office.

PDI Global's print newsletters leverage these communication strengths. Their standout cover designs and engaging article titles grab attention and encourage opening and reading.

The large area they offer for personalization on the front cover — as well as the entire back page — enables you to brand them

with your logo and customize them with such items as:

- Photos and bios of key team members
- Firm news, contact information and service descriptions
- An additional article on a topic you'd like to cover
- Success stories, client profiles and testimonials
- An advertisement, special offer or invitation
- Self-mailer information

Our print newsletters are eight pages and measure 8.5x11" unopened. They can be mailed flat or folded, either as self-mailers or in an envelope. We can also create custom designs just for you.

CONTENT-ONLY

Prefer to produce your own newsletter? Or want to regularly receive professionally written content for your website and other communications? Consider a content-only subscription to a PDI Global newsletter.

On a bimonthly basis you'll receive Word files you can edit, byline and use as you like.

Insert them in your own newsletter, post them on your website or social media site, submit them for publication in local industry and business journals, or use them for your blog.

Our articles not only save time and effort. They also provide you with quality content for less than it would take to produce something comparable in-house.



PDI Global newsletter showing personalizable front page, sample inside spread and sample back page customization.

TAX PLANNING GUIDE

Want to build stronger and more profitable client relationships? Use PDI Global's tax guide to show clients, prospects and other contacts how to save tax and achieve their financial goals — and save yourself the task of creating your own guide.

Our guides feature image-enhancing designs you can brand with your logo and customize with information about your firm. The professionally written content positions you as an expert on the topics discussed and encourages contact for more information or assistance.

We invite you to put these versatile marketing and client communication tools to work for your firm:

ONLINE TAX GUIDE

With **WebTaxGuide**, you simply post a button on your website that links to this online tax guide, and we update the contents whenever tax law changes affect it. **WebTaxGuide** features:

- A choice of personalizable splash page designs
- A reader-friendly layout with quick and easy navigation
- Informative charts and case studies
- Content for a wide range of business and individual taxpayers

To help you draw attention to your online guide, we offer a package of three standard-size **WebTaxGuide** banner ads you can purchase and brand to post on your website, include in your e-newsletter, place in other e-publications, or add to your social media profiles.

EMAIL TAX GUIDE

Our **Flex-E-guide** email program links to our online **WebTaxGuide** (described at left), so the information recipients see is always up-to-date. **Flex-E-guide** gives you a cost-effective way to push out your online tax guide to clients and other contacts. It comes with:

- An eye-catching HTML email template you can modify as you like, personalize with your logo and customize with a message or other information
- Our **Flex-E-mail** e-communication system, which features sophisticated email distribution, list management, tracking and report-generation technology that you can use for other purposes, too
- Powerful tracking technology that helps identify reader interests and service opportunities
- A personalizable online **WebTaxGuide** to post on your site



Flex-E-guide links to your personalized WebTaxGuide splash page.

Your splash page links directly to the online WebTaxGuide.



PRINT TAX GUIDE

The booklet version of the guide, available each July, presents tax-saving strategies for the current tax year. With our print **Tax Planning Guide**, you get:

- A choice of content for:
 - 1) General taxpayers (Classic tax guide, in 8.5x11" or pocket-size booklets) or
 - 2) High-net-worth taxpayers (Executive tax guide, in 8.5x11" size only). *Only PDI Global has a guide for this important market!*
- A choice of cover designs with extensive areas for customization on the outside and inside covers
- The content you choose in PDF format, too

The attractive design and informative contents of our print guide make a favorable and lasting impression on those who receive it. Use this versatile communication tool to:

- Introduce your firm to prospects and thank clients for their business
- Keep your firm top-of-mind with clients and referral sources
- Include in proposals and display in your office
- Hand out at meetings, seminars and conferences

VALUE-ADDED EXTRAS

Whichever format of our tax guide you choose, you'll also get for free our:

- **Tax Law Change Updates** you can email to clients and contacts to inform them about important new tax laws
- **Tax Practice Marketing Guide** with tips for using and maximizing the effectiveness of your PDI Global electronic and print tax guides

In addition, you can purchase our annual **Tax Rate Card**, which comes out in January and presents a handy summary of federal income tax rates, standard deductions, exemption amounts, mileage rates and other tax schedules for the year. Brand and use it as a handout, business card, or mailing insert — and post a PDF of it on your website, too.



Print **Tax Planning Guides** are available in two sizes with three standard cover options.

ESTATE PLANNING GUIDE

How can you show clients and prospects the importance and benefits of estate planning — and encourage them to contact you for more information or assistance? By giving them a copy of **Selecting the Best Estate Planning Strategies**.

You'll find this guide a versatile marketing and client communication tool that can help you take advantage of the strong and growing demand for estate planning services. Use it to develop profitable relationships with:

- Business owners and other high-net-worth individuals
- Families with elderly parents
- Retirees and senior citizens
- Clients, prospects and referral sources

AVAILABLE IN PRINT AND ELECTRONIC FORMATS

Our estate planning guide is available in online (PDF) and print (8.5x11" booklet) formats that you can personalize with your logo and customize with other information on the inside and outside covers. It provides a thorough overview of tax-efficient ways to achieve one's wealth preservation and transfer goals. Topics include:

- Wills, trusts and selection of heirs and trustees
- Succession planning and family business issues
- Life insurance and asset protection strategies
- Gifting, charitable contributions and strategies for special situations

Hand out the guide at meetings, mail it out as an introduction or thank-you, post a PDF of it on your website, or display it in your office to increase awareness of your services and position your firm as the place to go for expert estate planning assistance.



PDI Global estate planning guide showing personalizable front page, sample inside spread and sample back page customization.

TAX AND ESTATE PLANNING SEMINAR-IN-A-BOX PRESENTATIONS

Lacking the time it takes to develop a professional-looking seminar on tax or estate planning? Our ready-to-use PowerPoint® presentations — complete with speaker notes — enable you to give seminars quickly, easily and cost-effectively.

Each **Seminar-in-a-Box** features:

- Attractively designed slides you can personalize with your firm's logo and contact information
- A roughly 90-minute presentation you can edit, rearrange or add to as you like
- Engaging slide copy that includes images, charts and graphs

Use these customizable, time-saving seminar programs to create opportunities to demonstrate your expertise, develop client relationships and start conversations that result in service requests.

TAX SEMINAR-IN-A-BOX

This comprehensive tax planning seminar program (approximately 100 slides) is aimed at business owners, high-net-worth individuals and other taxpayers. While the graphics, images and copy used in **Tax Seminar-in-a-Box** are based on our **WebTaxGuide** (see page 6) you can use the presentation with or without any versions of our tax guide. Topics include investing, the AMT, charitable giving, real estate, retirement and estate planning.

ESTATE PLANNING SEMINAR-IN-A-BOX

This presentation (approximately 80 slides) targets a broad audience, including business owners, retirees, high-net-worth individuals and families with aging parents. The content is based on our **Selecting the Best Estate Planning Strategies** guide (see page 8) but can be used with or without it. Topics include wills, trusts, beneficiaries, life insurance, gifting, buy-sell agreements, charitable giving and probate.



Tax Seminar-in-a-Box sample slides.

Estate Planning Seminar-in-a-Box sample slides.

CONTENT, ARTICLES AND ALERTS YOU CAN MAKE YOUR OWN

Would you like a source of professionally written content that saves you time, positions you as a thought leader and facilitates regular communication with clients and other contacts? Content that you can shape as you like for different purposes and audiences?

This is exactly what our **Content Store** and **Tax Alerts** offer. You'll find them a handy source of information that can help achieve your communication objectives. Plus, you can combine **Content Store** articles with our **Flex-E-mail** system to create custom e-newsletters and other communications.

ONLINE CONTENT STORE

The store contains thousands of articles on legal, business, tax, and financial planning subjects. Search by keyword and date, and then preview, purchase and download (in Word format) the articles you want. Edit and byline them as you like to:

- Post on your website, blog or social media site
- Email to clients and contacts
- Submit for publication under your byline in local media
- Respond to information requests
- Use as handouts or proposal inserts
- Include in newsletters and marketing materials

Articles are professionally written and generally between 300 and 1,200 words in length. You can purchase them one at a time or through a money-saving multi-article annual subscription.

Package your **Content Store** subscription with our **Flex-E-mail** e-communication system to build your own newsletters, legislative updates and other email messages. You can use one of the dozens of templates provided, create your own, or have us design one for you. Then just flow in articles you select from the **Content Store** or draw from your own sources, and send them in a branded template to your list.

TAX ALERTS

These thought leadership tools give you an easy way to provide clients and prospects with timely information about tax laws and regulations, tax and estate planning strategies, and related matters.

This time-saving, cost-effective program consists of roughly 10 alerts per year (more if warranted by legislative developments). Most are on late-breaking tax news, while a few are on timely tax or financial planning subjects.

Alerts are professionally written and reviewed by experts for technical accuracy, and include examples or case studies to illustrate key points. You can edit and use them as you like for client and other communications:

- Flow the copy through your email template for sending to contacts.
- Include the alerts in your newsletter or post them on your website.
- Use them as content for your blog and social media messages.
- Print them out on branded stock to use as handouts or proposal inserts.
- Combine them with our **Flex-E-mail** delivery and tracking system as an easy way to quickly distribute a professional-looking update.

Our **Tax Alerts** program gives you a means of frequently "touching" clients and communicating with other contacts. So you not only keep your firm's name top of mind; you also enhance its image as a thought leader that's always on top of important developments.

LEVERAGE THIS CONTENT WITH FLEX-E-MAIL

Our **Flex-E-mail** e-communication system features sophisticated email distribution, tracking and list management technology that enables you to:

- Create custom newsletters and other communications
- Segment your lists into as many categories as you like
- Tailor your messages to specific audiences
- Insert as many links as you like into the template
- See who opened the email and clicked on which links, so you can identify recipient interests

Flex-E-mail enables you to communicate with clients and other contacts when and as often as you like. You'll find it a great addition to your content marketing and client communication programs.

CUSTOM COLLATERAL DEVELOPMENT AND EDITORIAL SERVICES

Need new collateral pieces, direct marketing materials or custom communications? We offer a full range of copywriting, graphic design and editorial services that can save you time and money while achieving your communication objectives. We are ready to help you with:

- Websites, collateral and identity programs (including logo development)
- Ads and direct marketing materials
- Email and proposal templates
- Webinars, seminars and PowerPoint® presentations
- Custom newsletters, tax guides, articles and other publications
- Announcements, press releases and other communications

Because we know the legal industry, we can help you project a strong brand identity and develop materials that make a compelling case for choosing your firm above others. We can also assist with content development, from selecting topics and conducting research to ghost-writing articles, editing drafts and publishing the finished work.



Examples of materials we've created for clients.

ABOUT PDI GLOBAL

Since 1980, Chicago-based PDI Global, now part of Thomson Reuters, has been helping law firms throughout the country achieve their marketing, business development and client communication goals. We are pleased to be a member of the Law Marketing Association and related organizations.

ABOUT THOMSON REUTERS

Thomson Reuters is the world's leading source of intelligent information for businesses and professionals. We combine industry expertise with innovative technology to deliver critical information to leading decision makers in the financial, legal, tax and accounting, healthcare and science and media markets, powered by the world's most trusted news organization. With headquarters in New York and major operations in London and Eagan, Minnesota, Thomson Reuters employs more than 55,000 people and operates in over 100 countries. Thomson Reuters shares are listed on the Toronto and New York Stock Exchanges (symbol: TRI). For more information, go to www.thomsonreuters.com.

LET US HELP YOU ACHIEVE YOUR GOALS

We would welcome the opportunity to learn about your marketing and client communication objectives and show how we can help meet them. Please contact us at 800-227-0498 or information@pdiglobal.com and let us know how we can be of assistance. Also, visit pdiglobal.com for more information about our products and services.

We look forward to helping you turn more of your firm's potential into profit.

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