



Business Card Order Form

Name (First M. Last): _____
Title: _____
Address: _____
Phone: _____
Cell: _____
Fax: _____
Email: _____
Additional Information: _____

Sample Business Card

First M Last Title	toll free (888) 657-5200 EXT fax (302) 250-4730 Name@coastal-one.com Coastal-One.com
Address	
<small>Securities are offered through Coastal Equities, Inc., Member FINRA/SIPC and investment advisory services are offered through Coastal Investment Advisors, Inc., a US SEC Registered Investment Advisor, co-located at 1201 N. Orange Street, Suite 729, Wilmington, DE 19801.</small>	

A financial professional may use standard CoastalOne stationery or design their own (subject to approval). However, all stationery items must contain applicable disclosures and be approved by CoastalOne prior to first use. This includes letterhead, business cards, fax coversheets, email disclosures, note pads, etc. CoastalOne requires the following information on all stationery:

- Branch office address
- Telephone number
- Financial professional's name and title: The title used should reflect the relationship with CoastalOne
- Definition of relationship: If a financial professional is using a title associated with an outside business entity, the title associated with this entity should be near the entity name. In addition, a disclosure must be added to identify the affiliation or lack thereof between any outside business entity and CoastalOne
- Broker-dealer disclosure requirements:
 1. **RR Only:** "Securities are offered through Coastal Equities, Inc., Member FINRA/SIPC, located at 1201 N. Orange Street, Suite 729, Wilmington, DE 19801."
 2. **RR & IAR:** "Securities are offered through Coastal Equities, Inc., Member FINRA/SIPC and investment advisory services are offered through Coastal Investment Advisors, Inc., a US SEC Registered Investment Advisor, co-located at 1201 N. Orange Street, Suite 729, Wilmington, DE 19801."
 3. **DBA RR Only:** Add the following sentence to the end of the RR Only Disclosure "Coastal Equities, Inc. is not affiliated with [DBA name here]."
 4. **DBA RR & IAR:** Add the following sentence to the end of the RR & IAR Disclosure "Neither Coastal Equities, Inc. nor Coastal Investment Advisors, Inc. are affiliated with [DBA name here]."
 5. **RR & Own RIA:** "Securities are offered through Coastal Equities, Inc., Member FINRA/SIPC, located at 1201 N. Orange Street, Suite 729, Wilmington, DE 19801. Investment advisory services are offered through [RIA NAME], a US SEC Registered Investment Advisor, located at [RIA ADDRESS]. [RIA NAME] is not affiliated with Coastal Equities, Inc. or Coastal Investment Advisors, Inc."