

## Project Information Sheet

Please complete and return this form to BMS Direct, Inc.

### Section I. Locality:

*If your Real Estate project only has date changes to the form and all other processing requirements for paper stock, inserts, printing colors, Lender handling, etc. remain the same as last year's mailing, type same here \_\_\_\_\_ and go to **Section II**.*

- **Estimated mail date (Real Estate):** \_\_\_\_\_
- **Estimated Real Estate quantity:** \_\_\_\_\_
- LENDER records found within the data/print file? \_\_\_\_ Yes or \_\_\_\_ No
- Do we process Lender records? \_\_\_\_ Yes or \_\_\_\_ No

#### **If Lender records are to be processed...**

- Do the Lender statements get mailed to the Lender Company? \_\_\_\_ Yes or \_\_\_\_ No
- Do the Lender statements get mailed to the homeowner? \_\_\_\_ Yes or \_\_\_\_ No
- Do the Lender statements get printed and shipped back to 'you' the client? \_\_\_\_ Yes or \_\_\_\_ No

**Additional inserts:** other than your statement form? \_\_\_\_ Yes or \_\_\_\_ No.

- Does BMS print the insert? \_\_\_\_ Yes or \_\_\_\_ No
  - Artwork sent to BMS on date: \_\_\_\_\_
  - Client supplied; delivery date to BMS? \_\_\_\_\_
    - Insert is printed Simplex, or Duplex \_\_\_\_\_
    - Insert is printed color, or black/white \_\_\_\_\_
  - **Paper Stock:** stock for bills to print on (i.e. Yellow, white, blue, green, etc) perf/non-perf: \_\_\_\_\_
  - **Special ink color** other than black required (i.e. spot Red, Green, etc): \_\_\_\_\_
  - **Business Reply Envelope (#9)** supplied by BMS included with statement? \_\_\_\_ Yes or \_\_\_\_ No
  - **Business Reply Envelope (#9)** supplied by client? \_\_\_\_\_ or Do NOT Include (#9) \_\_\_\_\_
  - **Blank statement copies** required? \_\_\_\_ Yes or \_\_\_\_ No
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### Section II.

*If your Personal Property project only has date changes to the form and all other processing requirements for paper stock, inserts, printing colors, etc. remain the same as last year's mailing, type same here \_\_\_\_\_ and go to **Section III**.*

- **Estimated mail date (Personal Property):** \_\_\_\_\_
- **Estimated Personal Property quantity:** \_\_\_\_\_

**Additional inserts:** other than your statement form? \_\_\_\_ Yes or \_\_\_\_ No.

- Does BMS print the insert? \_\_\_\_ Yes or \_\_\_\_ No
  - Artwork sent to BMS on date: \_\_\_\_\_
  - Client supplied; delivery date to BMS? \_\_\_\_\_
    - Insert is printed Simplex, or Duplex \_\_\_\_\_
    - Insert is printed color, or black/white \_\_\_\_\_
  - **Paper Stock:** stock for bills to print on (i.e. Yellow, white, blue, green, etc) perf/non-perf: \_\_\_\_\_
  - **Special ink color** other than black required (i.e. spot Red, Green, etc): \_\_\_\_\_
  - **Business Reply Envelope (#9)** supplied by BMS included with statement? \_\_\_\_ Yes or \_\_\_\_ No
  - **Business Reply Envelope (#9)** supplied by client? \_\_\_\_\_ or Do NOT Include (#9) \_\_\_\_\_
  - **Blank statement copies** required? \_\_\_\_ Yes or \_\_\_\_ No
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### Section III.

- **Return Ship to Address:** *example of types of return items such as special samples, Lenders, etc.*
  - County Name: \_\_\_\_\_
  - Attn to: \_\_\_\_\_
  - Address: \_\_\_\_\_
  - City/State/Zip: \_\_\_\_\_

### Section IV.

#### Statement Form Updates and Edits:

Please make all edits on the previous form that your Project Manager has sent from the last run. Edit text can also be sent in a Microsoft Word document with the edits numbered to match numbering on previous form.

Once we receive ALL of your edits in house (*please send all edits at one time*), then BMS will forward a new form proof for approval.

***NOTE: If major edits are required or your taxing software has changed, contact your Sales Representative Immediately.***

#### DATA

- **LIVE data file(s)** a file layout must accompany data files in the following scenarios: change in file field names, new field additions, deletions of fields. Changes from previous years file layout may incur additional programming costs depending on the scope.
- **Do you have any low balance requirements for not mailing a bill?** Amount \$ \_\_\_\_\_ Print Suppress  
Return
- **PULLS:** all pulls must be sent at **final print approval, or prior**.
- **Final Print Approval:** If approved before 9:00am EST, then that day counts as a processing day. If after 9:00am EST, then it does not count as a processing day.

**Postage – MUST be received a minimum of three (3) business days in advance of a mail date by BMS. Otherwise, mail dates will move out until postage is received in house.**

**Note: posting of ACH and wire transfers for postage funds can take up to three days to post in our accounts.**

**Please provide any special instructions for processing your data file or tax bill mailing.**

SPECIAL INSTRUCTIONS/Comments: