

# BRAND AND CAMPAIGN REGISTRATION FORM

## (TO ENABLE TEXTING FROM Crexendo Telephone Numbers)

Text messaging from a Crexendo Number **requires** a Brand and Campaign Registration form to be submitted and approved by “The Campaign Registry” (TCR).

The “Brand” is your legal company name, and the “Campaign” is defined as sending **one text message from a Crexendo telephone number.**

If you have questions, or when you are ready to submit the forms, please email them to [cr@crexendo.com](mailto:cr@crexendo.com).

### BRAND Registration

<b>LEGAL COMPANY NAME: REQUIRED</b> (This is considered your “Brand”) – This is the name Registered with the IRS and may include dba name.	<b>CEDAR GROVE FINANCIAL ASSOCIATES, LLC</b>
<b>BUSINESS TYPE: REQUIRED</b> Must be one of the following Business Entities <b>Publicly Traded</b> <ul style="list-style-type: none"><li>• If selected, include stock symbol and exchange name.</li></ul> <b>Private</b> <b>Non-Profit</b> <b>Government</b>	<b>PRIVATE</b>
<b>COUNTRY OF REGISTRATION: REQUIRED</b> “USA” or specify other country.	<b>USA</b>
<b>TAX NUMBER/ID/EIN: REQUIRED</b>	<b>81-2293055</b>
<b>LEGAL COMPANY ADDRESS: REQUIRED</b> Please include Street Address, City, State and Zip Code	<b>1880 S COBALT POINT WAY, SUITE 210 MERIDIAN, IDAHO 83642</b>
<b>CONTACT EMAIL ADDRESS: REQUIRED</b> (TCR may send a message to this email address).	<b><a href="mailto:CEDARGROVEFA@GMAIL.COM">CEDARGROVEFA@GMAIL.COM</a></b>
<b>CONTACT PHONE NUMBER: REQUIRED</b> Please include area code.	<b>208-453-4924</b>

**COMPANY WEBSITE: REQUIRED**

Please provide the complete website address. This must be a working website – if no website, please provide other on-line presence for the Brand: Facebook, Google Review Page, Instagram, etc. Please provide the complete address.

**Website content required:**

Privacy Policy

- Must be clear that end user’s personal info will not be shared or sold to third parties for the purpose of marketing.
- Example statement: “No mobile information will be shared with third parties/affiliates for marketing/promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.”

If webforms are a part of the website, SMS disclosure must be included on the form. The disclosure needs to include:

- Texting disclosure – Example: “By submitting this form, you consent to receive communications (including text messages) from us. You may opt out at any time.”
- Help/Stop information.
- Message Frequency - Frequency examples: “#msgs/mo”, “msg frequency varies”, “recurring messages”, etc.
- Pricing – Example: “message and data rates may apply”.
- Link to the Privacy Policy and Terms.

The TCR will not approve your registration if the above content is not included.

[HTTP://CEDARGROVEFA.COM](http://cedargrovefa.com)

**Under Construction**

**FACEBOOK**

**CEDAR GROVE FINANCIAL ASSOCIATES**

**VERTICAL MARKET: REQUIRED**

Must be ONE of the following:

- Media and Communication
- Construction, Materials, and Trade Services
- Education
- Energy and Utilities
- Financial Services
- Government Services and Agencies
- Healthcare and Life Sciences
- Hospitality and Travel
- HR, Staffing, or Recruitment
- Insurance
- Legal
- Manufacturing
- Non-Profit Organization
- Postal and Delivery
- Professional Services
- Real Estate
- Retail and Consumer Products
- Information Technology Services
- Transportation or Logistics

**INSURANCE**

## CAMPAIGN Registration

<p><b>CAMPAIN DESCRIPTION: REQUIRED</b></p> <p>Please provide a few complete sentences defining your purpose for sending text messages. Why are you sending text messages?</p> <p>Description must contain <b>40 or more characters</b> to be accepted.</p>	<p><b>REQUESTING OR RECEIVING INFORMATION &amp; OR DOCUMENTS VIA TEXT MESSAGING.</b></p> <p><b>CAN YOU TEXT OR EMAIL A COPY OF YOUR DRIVER'S LICENSE?</b></p>
<p><b>CALL TO ACTION: REQUIRED</b></p> <p>TCR (<a href="#">The Campaign Registry</a>) Call-to-Action definition: This field should describe how a consumer opts-in to the campaign, (how telephone numbers are obtained) providing consent to you to receive your messages. The Call-To-Action must be explicitly clear and inform the consumer of the nature of the texting program.</p> <p>Provide a clear, understandable description of how your customer submits their numbers; how you respond to confirm intent; and how customer can receive assistance or opt-out.</p> <ul style="list-style-type: none"><li>• Include Message frequency “#msgs/mo”, “msg frequency varies”, “recurring messages”, etc.)</li><li>• Include Link to Terms &amp; Conditions and Privacy policies.</li><li>• Include “Message and data rates may apply” disclosure.</li><li>• Include Opt-Out instructions (“Reply STOP to Opt-out”)</li></ul>	<p><b>MESSAGES WOULD BE TO OR FROM CLIENTS OR PERSONNEL THAT WE ALREADY HAVE ON FILE.</b></p>
<p><b>SAMPLE MESSAGE: REQUIRED</b></p> <p>Please provide a sample text message that you would send for this campaign. Your sample message must include the <b>Brand Name</b> and <b>Opt-out</b> (“Reply STOP to opt out.”) information. This should reflect an actual message you would send. <b>Minimum sample message must be 20 characters.</b></p>	

<p><b>SAMPLE SUBSCRIBER OPT-IN Message: REQUIRED</b></p> <p>Please provide all keywords used and your opt-in message.</p> <p>Example:  <b>Keyword is "JOIN"</b>  <b>Message:</b> [Company Name] would like to add you to our texting community. To receive text messages, reply "JOIN", to stop text messages reply "STOP", for assistance reply "HELP". Message frequency varies as responses are requested, messages and data rates may apply. %</p> <p><b>Please provide your opt-in Message in the right column.</b></p>	
<p><b>SAMPLE SUBSCRIBER OPT-OUT Message: REQUIRED</b></p> <p>This is to confirm this number has been removed from the list of your customers receiving text messages from you. Provide additional key words as needed.</p> <p>Example:  <b>Keyword is "STOP"</b>  <b>Message:</b> You have replied "STOP" to a text message from [Company Name]. This number has been removed from our texting community. You will not receive any additional text messages.</p> <p><b>Please provide your opt-out Message in the right column.</b></p>	<p><b>"STOP"</b></p> <p><b>You have replied "STOP" to a text from Cedar Grove Financial Associates. This number has been removed from our texting community. You will not receive any additional text messages.</b></p>
<p><b>SAMPLE SUBSCRIBER HELP Message: REQUIRED</b></p> <p>Please provide all keywords used and your HELP message. Include Company name and customer contact information.</p> <p>Example:  <b>Keyword is "HELP"</b>  <b>Message:</b> [Company Name] has provided the following information. If at any time you need help with texting us, please reply "HELP", or send an email to [phone number or url]</p> <p><b>Please provide your Help Message in the right column.</b></p>	
<p><b>NUMBER POOLING: REQUIRED</b></p> <p>A campaign is limited to 49 "texting from" telephone numbers. If you are requesting more than 49 numbers to be enabled for a single campaign, please answer "yes" to this question, and provide the total number of phone numbers to send text messages.</p>	<p style="text-align: center;"><b>No</b></p> <p><b>If you answer yes, please provide total number of phone numbers needed to be enabled for texting.</b></p> <p><b>Total numbers of texting numbers: _____</b></p>

<p>The ability to text from more than 49 numbers will require additional information, additional processing time, and a fee of \$3,000 per additional campaign.</p>	
<p><b>DIRECT LENDING OR LOAN ARRANGEMENT: REQUIRED</b> Indicates whether your text messages include content related to direct lending or other loan arrangements. (Does your company provide loans?)</p>	<p><b>No</b></p>
<p><b>EMBEDDED LINK: REQUIRED</b> Indicates whether your text messages include an embedded link of any kind. Note that public URL shorteners (bitly, tinyurl) are not accepted.</p>	<p><b>No</b></p>
<p><b>EMBEDDED PHONE NUMBER: REQUIRED</b> Indicates whether your text messages include an embedded phone number (except the required HELP information contact phone number).</p>	<p><b>No</b></p>
<p><b>AGE-GATED CONTENT: REQUIRED</b> Indicates whether your text messages include any age-gated (required proof-of-age) content as defined by Carrier and CTIA guidelines.</p>	<p><b>No</b></p>
<p><b>TERMS &amp; CONDITIONS: REQUIRED</b> I confirm that this campaign will not be used for Affiliate Marketing.</p>	<p><b>Yes</b></p>
<p><b>Please List All Crexendo Telephone Numbers Associated with this Campaign (10 Digits):</b> These are your telephone numbers that will be enabled for texting once the campaign is approved. (Limit 49 numbers.)</p>	<p><b>Example: 555-123-5555</b></p> <p><b>(208)-453-4924</b> <b>(208) 994-7659</b></p>

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Please email this form to [cr@crexendo.com](mailto:cr@crexendo.com)

## Disallowed Content Policy

The following categories have been recognized as harmful and/or deceitful to the end consumer and cannot be run on any U.S. messaging product (text messages). Approval will not be received for these categories.

### High-risk financial services

- Payday loans
- Short-term high interest loans
- Auto loans
- Mortgage loans
- Student loans
- Debt collection
- Gambling/sweepstakes
- Stock alerts
- Cryptocurrency

### Get-rich-quick schemes.

- Deceptive work-from-home programs
- Risk investment opportunities
- Multi-level marketing

### Job postings

Exceptions are permitted if the message sender is the one doing the hiring.

### Debt forgiveness

- Debt consolidation
- Debt reduction
- Credit repair programs

### Controlled substances

- Cannabis and CBD
- All Schedule 1 and 2 drugs
- Tobacco and vape (Allowed with age gate)

### Others

- Phishing
- Pornography
- Profanity or hate speech
- Gambling
- Fraud and scams
- Deceptive marketing
- Lead generation (all affiliate marketing must be carrier-approved)

