

AMENDMENT # A1

Contract # EDS A27-26-018-A1

This is an Amendment to the Contract (the "Contract") previously identified as EDS # A27-26-018 entered into by and between the **Indiana Secretary of State (the "State")** and **Marketing Informatics LLC (the "Contractor")** approved by the last State signatory on December 16, 2025.

In consideration of the mutual undertakings and covenants hereinafter set forth, the parties agree as follows:

1. The contract is extended for an additional 9 months and shall remain in effect through **December 31, 2026**.
2. Services and pricing detailed in **Attachment A** shall apply to the term of contract extension. Total remuneration for services during the contract extension shall not exceed Two-Hundred Six Thousand, Five Hundred Dollars (\$206,500.00). Total remuneration for this contract, as amended shall not exceed Two Hundred Eighty-seven Thousand Dollars (\$287,000.00).

All matters set forth in the original Contract and not affected by this Amendment shall remain in full force and effect.

Non-Collusion and Acceptance

The undersigned attests, subject to the penalties for perjury, that the undersigned is the Contractor, or that the undersigned is the properly authorized representative, agent, member or officer of the Contractor. Further, to the undersigned's knowledge, neither the undersigned nor any other member, employee, representative, agent or officer of the Contractor, directly or indirectly, has entered into or been offered any sum of money or other consideration for the execution of this Amendment other than that which appears upon the face hereof. **Furthermore, if the undersigned has knowledge that a state officer, employee, or special state appointee, as those terms are defined in IC § 4-2-6-1, has a financial interest in the Amendment, the Contractor attests to compliance with the disclosure requirements in IC § 4-2-6-10.5.**

In Witness Whereof, the Contractor and the State have, through their duly authorized representatives, entered into this Amendment. The parties, having read and understood the foregoing terms of this Amendment, do by their respective signatures dated below agree to the terms thereof.

Marketing Informatics LLC [Contractor]

Indiana Secretary of State [Indiana Agency]

By: Derrick Smith

By: Jerold A. Bonnet
Jerold A. Bonnet, Deputy Secretary of State

Derrick Smith, President
Name and Title, Printed

Date: 3/24/2026

Date: 03/24/2026



RFP Response for Marketing Informatics

Proposal ID: SOS-26-011

Marketing Services – Direct Mail – BSD & ADSD

1. COMPANY PROFILE

Marketing Informatics (Mi) was established in 1987 and created a mission of enabling our clients to effectively communicate with their consumers and constituents. That founding focus has not changed over 39 years and has guided the company as it grew and evolved. Over time media channels and marketing tools have developed, iterated and grown in complexity. Today, our services include data provision, data management, printing, direct mail, digital advertising, and media placement.

To serve our clients and develop long-term relationships, our internal team members are guided by the values of integrity, excellence, kindness, trust and adaptability. These principles are tremendously important as we make decisions, provide support and share responsibilities.

Mi's clients represent a wide range of industries including Financial Services, Non-Profit, Government, Retail, and Restaurants which represents the largest single industry. We support clients based on their own marketing and communications needs, which vary substantially from industry to industry. In restaurants for example, we work directly with corporate entities and franchise owners throughout a lifecycle from Grand Opening through seasonal menu changes, refreshes, remodels and everyday needs.

We reach consumers that live or work nearby as well as on electronic devices in a mobile-first environment. We produce residential and b2b direct mail as well as place digital ads on Meta, Google, YouTube and other platforms which allows our clients to be present where consumers are spending their time. Direct mail capabilities include all types of printed materials, lettershop services, USPS and postage management.

To provide scale and make a statement about our ability to manage a large volume of work, Mi produced more than 4,100 projects, nearly 10 million direct mailers and 90 million digital impressions in the last year. We are both capable and ready to immediately implement the work as described in the Engagement section of this document. No disruption from current direct mail services would be realized.

Mi's is solely owned by Robert & Dianna Massie, who have been Indianapolis residents since the 1980's.

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Marketing Informatics



The company's headquarters is in Indianapolis. The company is a registered bidder with the state of Indiana. Bidder ID 0000031341

Derrick Smith is the President, has been with the company since 1996 and oversees the operation. Derrick has been a resident of Indiana since 1994.

Contact Information:

525 S Meridian St, Ste GA3

Indianapolis, IN 46225

<https://www.marketinginformatics.com>

317-788-4440

Derrick Smith

Derrick.smith@marketinginformatics.com

317-727-3715

2. STAFFING

Mi will utilize two front office staff members for the Secretary of State contract work. Derrick Smith will be the primary point of contact, communicating with SOS team members to manage communications about timing, securing data, providing direct mail proofs and obtaining approvals, billing, reporting, issue resolution or other information. A Project Manager will provide support by executing or managing project setup data processing, proof production, printing and mailing production, envelope inventory, postage, project closeout, and information management.

All people working on the printing equipment and mailing equipment for the SOS monthly direct mailers are citizens and reside in Indiana.

3. TECHNOLOGY

The technological needs for this contract are substantial and include elements of data transfer, USPS data processing, proof transfer and approval, variable data printing and mail preparation.

There will be two touchpoints of data exchange:

- submission of direct mail data/ mailing lists to Mi
- direct mail proofs of the direct mail template with embedded mailing data to SOS for approval

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Marketing Informatic



Email or ftp can be utilized for these exchanges based on the needs of the SOS.

Mi utilizes BCC and Windowbook as their USPS approved data processing software packages. The SOS mailing lists will be processed in these software packages to achieve the highest quality deliverable mailing addresses, density sortation and postage savings for the Marketing Mail postal category. The steps in the process include:

- Address standardization so that all addresses meet USPS deliverability standards
- National Change of Address to the most current address for each recipient
- Presorting to achieve Zip+4 densities and maximize postage savings
- Palletization for delivery to the appropriate postal facilities

Completed Mail.dat USPS files and documents will be loaded to the USPS PostalOne dashboard as data processing is completed. These include:

- Piece data: address, intelligent Mail barcode, mail class, preparation data
- Postage Statement: postage, pieces, weight, qualifications
- Qualification Report: mailing meets Full Service eligibility
- Sortation Data: address density sortation and tray counts
- Container/Pallet Data: pieces per container & pallet
- Confirmation Acceptance Notice: barcoded for USPS induction

Variable data printers will be utilized to produce finished letters or cards each bearing specific information about a particular business or individual and a stated action to be taken to remain compliant with the Secretary of State.

4. BILLING

Billing will be based on a timing schedule and a pricing schedule. As direct mailers are completed, invoices with appropriate Terms would be emailed directly to the AP contact and the SOS's agent. Payments would be made via direct deposit through electronic funds transfer based on the Terms.

Disputes about services rendered or payments can be made by emailing the Mi contact. Specificity about disputed items should be provided and will be reviewed within five business days. Engagement between the parties about the dispute will be conducted via email and appropriate corrective measures will be executed as agreed upon. Should an agreement about the dispute not be reached, Mi agrees to follow the dispute resolution process outlined in the Proposal ID SOS 26-011, Exhibit B Item 16, Disputes.

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5. ENGAGEMENT

Mi is specifically bidding on this Scope of Work under the terms of this contract: Each month, the Secretary's office will provide data files to Mi for six distinct mailers. These six mailers are produced each month at these average quantities:

Mailer	Mail Qty	Ave Qty
Business Entity Report Notice (BER)	192,000	16,000
Administrative Revocation Notice (AdRev)	99,600	8,300
Revoked Notice (Revoked PC)	87,600	7,300
Notary 30 Day Continuing Education Notice (Notary 30 Day)	18,000	1,500
Notary Past Due Continuing Education Notice (Notary Past Due)	12,000	1,000
Auto Dealers Notice	5,580	465

Mi would manage these direct mail functions:

- USPS data preparation which consists of:
 - Standardizing addresses to match the USPS delivery database
 - National Change of Address to ensure mail delivers to the current recipient address
 - Presorting which allows for maximizing densities of addresses to reduce postage
 - Palletizing completed mailers for entry into the correct postal facilities
- Printing letters with personalized information per recipient
- Mail preparation of folding printed letters, inserting them into envelopes and delivering them to the USPS facility
- Producing envelopes and maintaining an inventory to reduce overall costs
- Payment of postage

Together, these functions will allow the Secretary to manage the flow of notices to Businesses and Notaries in a cohesive and professional manner while maximizing cost and postage savings. Only these functions identified in this proposal would be required in this contract.

Metrics established for this contract consist of target mailing dates for each direct mail notice type. Meeting target mailing dates will be a joint responsibility of the SOS and Mi - a sample of responsibilities is shown on the following page. The mailing dates may be impacted by receipt of mailing lists on specified dates, availability or responsiveness of SOS's agent as well as holidays.

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Direct Mailer	Action 1 (SOS)	Date	Action 2 (Mi)	Timing	Action 3 (SOS)	Timing	Mail Date
BER	Mailing List Delivery	21st	Mailing Proof Delivery	3 business days	Proof Approval	2 business days	1st of the month
AdRev	Mailing List Delivery	21st	Mailing Proof Delivery	7 business days	Proof Approval	2 business days	5th of the month
Revoked PC	Mailing List Delivery	21st	Mailing Proof Delivery	12 business days	Proof Approval	2 business days	15th of the month
Notary 30 Day	Mailing List Delivery	21st	Mailing Proof Delivery	3 business days	Proof Approval	2 business days	1st of the month
Notary Past Due	Mailing List Delivery	2nd	Mailing Proof Delivery	3 business days	Proof Approval	2 business days	10th of the month
Auto Dealers	Mailing List Delivery	19th	Mailing Proof Delivery	4 business days	Proof Approval	3 business days	1st of the month

6. MONETARY PENALTIES

Mi is highly experienced in meeting metrics, such as those outlined in the Engagement section of this document. Working with many clients through many projects simultaneously, we know that our value is rooted in accuracy and timeliness. The proofing process which is a standard practice in the mailing industry, is based on the activity of both the SOS's agent and Mi. It requires both parties to compare the mailer type and corresponding mailing list prior to Mi producing the mailers and releasing them to the USPS. Any errors uncovered in this process would be immediately rectified and new proofs would be examined and approved by the SOS's agent. The SOS's agent has the opportunity to thoroughly review, question and request edits if necessary. Likewise, if the SOS's agent must meet the deadline metrics in order to achieve the mailing dates.

Monetary penalties would only apply in these instances:

- Mi neglected to follow the proofing process and release completed mailings to the USPS without SOS review and approval
 - The mailers produced were not the same as those approved by the SOS's agent.
- The monetary penalties would be limited to the cost to reproduce and mail corrected mailers if an accuracy error occurred.

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7. PRICING

Pricing reflects these considerations:

- Discounts based on the number of direct mail types
- Postage paid by Mi at the time of each mailing to be reimbursed by the state on Terms
- Unlimited letter or card template edits at no extra cost
- Bulk production of envelopes to maximize cost savings
- Storage of envelopes at no extra cost
- Delivery of processed mail to multiple USPS facilities to maximize postage savings
- BSD and ADSD combined into a single grid

Pricing for 04/01/26 - 12/31/2026

BER, AdRev, Notary 30 Day, Notary Past Due, Auto Dealer pricing grid

Qty	300	400	500	1,000	3,000	5,000	7,500	10,000	15,000
Price/Piece	\$1.272	\$1.064	\$0.940	\$0.723	\$0.623	\$0.595	\$0.584	\$0.576	\$0.569

*Envelope cost is an additional \$0.0427 for BSD and \$0.074 for ADSD

*\$500 minimum per project

Revoked PC pricing grid

Qty	2,000	3,000	5,000	7,000
Price/Piece	\$0.627	\$0.609	\$0.590	\$0.587

Annual Not to Exceed costs

04/01/26 to 12/31/26 is \$200,000 BSD and \$6,500 ADSD

Thank you for allowing us to provide this proposal response.

We are appreciative of the opportunity to implement successful direct mail programs for the Secretary's office.

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