planadviser®

MEDIA KIT 2021

Our Mission

Over the past decade, retirement plan advisers have fundamentally reshaped the face of retirement benefits programs, and PLANADVISER has been there every step of the way. Our mission is to provide deep insight into the most pressing retirement planning challenges and opportunities facing this specialized group, who do so much every day to help improve the financial future of many millions of Americans. Through our diverse media channels, we seek to identify, explore and supply insight on the critical and evolving topics that retirement plan advisers grapple with every day—from highly sensitive compliance issues to breaking news about the markets.

Our Audience

Launched in 2006, PLANADVISER remains the only magazine to solely address the specific needs and concerns of advisers who specialize in the sale and servicing of institutional retirement plans and related products and services, including 401(k), 403(b) and 457 plans, health savings accounts (HSAs) and defined benefit (DB) pension plans. plans.

Our Reach

PLANADVISER offers you, as industry providers, a powerful array of customer-focused marketing programs and informational resources to strengthen your brand. No other media source in this space can provide such a clear path to reach this influential and specialized group of advisers. There's no better way to connect with the top advisers in this business than through our award-winning magazine industry-leading events, daily online news, electronic newsletters, webcasts, multimedia resources and social media connections.

What We Do

Magazine: With its reputation for editorial integrity, objectivity and leadership, PLANADVISER is the trusted information and solutions resource for America's retirement benefits decisionmakers. Feature your firm and establish your position as an industry leader by advertising or contributing to the content of the print and digital publications.

Digital: At PLANADVISER.com, we deliver news and insight into the issues and changes that shape the retirement industry. Increase your brand awareness with exposure to our average monthly audience of 43k+ plan advisers who specialize in institutional retirement.

Conferences: PLANADVISER hosts a series of industry-leading in-person and virtual conferences throughout the year. Stand out as a leader in the retirement benefits community. Put your company's insights in our spotlight and be where the action is.

Newsletters: Each issue provides the latest news and insight into the issues and changes that shape the retirement industry. Display and native advertising opportunities are available.

Webcasts and Webinars: Through sponsored webcasts and our monthly editorial webinar series, we facilitate discussions about the latest trends, strategies and potential problems that plan advisers need to understand. Increase the impact of your firm's messaging as a thought leader by leveraging our platforms.

Research: As a leading authority on retirement and benefits programs, PLANADVISER offers industry providers a powerful array of industry studies and research-driven projects. Align with our brand by sponsoring one of our annual industry surveys, accessing our proprietary data programs, or pulse this audience by conducting custom research.

Audience Profile*

Audience Reach

15,566
Magazine subscribers

8,345
Print subscribers

7,213
Digital subscribers

Digital Traffic

43,500
Unique visitors

137,500
Page views

1:40 minutes average
Time spent on site

Magazine Audience Types of Retirement Plans

401(k)	32%
403(b)	19%
Defined benefit	19%
Nonqualified deferred compensation plan	16%
457	13%

Digital Audience Types of Retirement Plans

DC, 401(k), 403(b), 457	78%
529 or other college savings plan	15%
Cash balance / defined benefit, hybrid plan	4%
Nonqualified deferred compensation plan	2%
Health Savings Account	1%

Magazine Audience Adviser Affilitaion

Independent Adviser	28%
Investment Provider/Recordkeeper	23%
Pension Consulting Firm	16%
Securities/Insurance/Regional Broker-Dealer	13%
Wirehouse	6%
Third Party Administrator (TPA)	6%
Bank or Trust Company	5%
Law Firm/CPA Firm	3%

Digital Audience Adviser Affilitaion

Financial Adviser (RIA–only)	28%
Financial Adviser (Dually Registered)	17%
Financial Adviser (Broker dealer/Insurance affiliated)	16%
Other Retirement Services (e.g. Law Firm, Actuary, CPA, etc.)	12%
Investment Consultant	12%
Financial Adviser (Wirehouse affiliated)	6%
Bank or Trust Company	5%
Financial Adviser (other)	4%

Magazine Retirement Assets Under Management

>$1B	22%
$500MM – $1B	8%
$250MM – $500MM	9%
$50MM – $250MM	21%
$25MM – $50MM	12%
$10MM – $25MM	9%
<$10MM	19%

Digital Audience Percentage of Retirement Assets Under Advisement

>$5B	27%
$1B – $5B	12%
$500MM – $1B	8%
$200MM – $500MM	10%
$50MM – $200MM	9%
$10MM – $50MM	10%
<$10MM	24%

Publisher's data. Audience profile data is for registered website and newsletter users.

2021 Editorial Calendar

January

ONLINE
- 3(38) vs. 3(21)
- Rollovers
- What would a K-shaped recovery mean?
- M&A analysis

ONLINE SPECIAL COVERAGE
The hierarchy of savings

WEBINAR 1/12
When and how to return to the office

SPOTLIGHT NEWSLETTERS
- ESG **1/13**
- Financial wellness: defining and delivering **1/27**

February

ONLINE
- Marketing strategies
- Digital retirement planning tools
- TDFs
- MEPs/PEPs

ONLINE SPECIAL COVERAGE
PLANADVISER Top 100

WEBINAR 2/9
College savings and student debt: 529 plans, student loans and financial wellness

SPOTLIGHT NEWSLETTERS
- Funds in focus **2/10**
- PEPs, MEPs and PPPs **2/24**

JANUARY/FEBRUARY MAGAZINE*
Regulatory and compliance

March

ONLINE
- Building a firm culture
- Mitigating conflicts of interest
- Balanced funds
- NQDC

ONLINE SPECIAL COVERAGE
Pros and cons of customization

WEBINAR 3/9
Artificial intelligence and financial advice

SPOTLIGHT NEWSLETTERS
- Solving retirement income **3/10**
- Advisers Giving Back **3/24**

April

ONLINE
- Succession planning
- Tax considerations for your practice
- ETFs
- HSAs

ONLINE SPECIAL COVERAGE
Serving the gig economy and part-time workers

WEBINAR 4/13
ESG

SPOTLIGHT NEWSLETTERS
- ESG **4/14**
- Financial wellness: defining and delivering **4/28**

MARCH/APRIL MAGAZINE*
Plan design

May

ONLINE
- Building referral networks
- Selling an advisory practice
- Annuities
- 529 plans

ONLINE SPECIAL COVERAGE
Participant insights

WEBINAR 5/11
Succession planning and how to retire as an adviser

SPOTLIGHT NEWSLETTERS
- Funds in focus **5/12**
- PEPs, MEPs and PPPs **5/26**

June

ONLINE
- Corporate social responsibility
- Understanding Medicare
- ESG
- PLANADVISER Top 100

ONLINE SPECIAL COVERAGE
DCIO Survey

WEBINAR 6/8
Evolution in the DCIO provider landscape

SPOTLIGHT NEWSLETTERS
- Solving retirement income **6/9**
- Practice management **6/23**

MAY/JUNE MAGAZINE*
Investments

July

ONLINE
- Team building & job allocation
- Participant engagement
- CITs
- DB plans

ONLINE SPECIAL COVERAGE
Balanced Fund and TDF Report

WEBINAR 7/13
Micro plans in focus—growing a practice with smaller clients

SPOTLIGHT NEWSLETTERS
- ESG **7/14**
- Financial wellness: defining and delivering **7/28**

August

ONLINE
- Build or buy tools
- Adviser practice audits
- Fixed income
- Small plans: SEP/SIMPLE

ONLINE SPECIAL COVERAGE
Small Plan Services Survey

WEBINAR 8/10
The future of health care—and what it means for retirement planning

SPOTLIGHT NEWSLETTERS
- Funds in focus **8/11**
- PEPs, MEPs and PPPs **8/25**

JULY/AUGUST MAGAZINE*
Growing your practice

September

ONLINE
- Adviser compensation
- RFPs and finalist presentations
- Managed accounts
- Non-ERISA plans

ONLINE SPECIAL COVERAGE
Retirement Plan Adviser of the Year

WEBINAR 9/14
How to lose a client (or not)—lessons learned from unsuccessful advisory relationships

SPOTLIGHT NEWSLETTERS
- Solving retirement income **9/8**
- Practice management **9/22**

October

ONLINE
- Envisioning retirement
- Cybersecurity and data privacy
- Student loan debt
- 403(b) plans

ONLINE SPECIAL COVERAGE
15TH anniversary of PLANADVISER and Retirement Plan Adviser Survey

WEBINAR 10/12
Learning from PLANADVISER Retirement Plan Adviser Survey

SPOTLIGHT NEWSLETTERS
- ESG **10/13**
- Financial wellness: defining and delivering **10/27**

SEPTEMBER/OCTOBER MAGAZINE*
Managing provider relationships

November

ONLINE
- Differentiating your practice
- Working effectively with TPAs and recordkeepers
- Social media
- Strategies for tax efficiency

ONLINE SPECIAL RESEARCH
Succession Planning and Diversity

WEBINAR 11/9
How has the PEP marketplace developed in year one?

SPOTLIGHT NEWSLETTERS
- Funds in focus **11/10**
- PEPs, MEPs and PPPs **11/24**

December

ONLINE
- Adviser industry consolidation
- Phased retirement
- Social Security planning and education
- Small plan profitability

ONLINE SPECIAL COVERAGE
Practice Benchmarking Survey

WEBINAR 12/14
Steps to advance diversity in the world of finance

SPOTLIGHT NEWSLETTERS
- Solving retirement income **12/8**
- Practice management **12/22**

NOVEMBER/DECEMBER MAGAZINE*
Practice management

**This calendar is subject to change. See detailed magazine editorial calendar on page 6.*

2021 Magazine Editorial Calendar

January–February

Regulatory & Compliance

Publishes in February

HIGHLIGHTS

- Litigation lessons
- Fiduciary: DOL/SEC
- SECURE/CARES Acts and 2021 legislative forecast
- Pooled employer plans
- 3(38): Solo or partnerships, plan vs. participant level
- Educating plan committees
- Cybersecurity

Sponsored reservation: 12/23/20
Ad reservation: 1/15/21
Ad material: 1/22/21
Mail date: 2/18/21

March–April

Plan Design

Publishes in April

HIGHLIGHTS

- Crafting a plan for retirement income/decumulation
- Plan distributions/loans and withdrawals
- Employer contributions
- Total benefits: HSAs, emergency savings, NQDC, ESOPs
- Demographic/generational considerations
- Re-enrollment/plan refresh
- Distinct considerations for plan types: 401(k), 403(b), ESOPs, non-ERISA plans

Sponsored reservation: 2/19/21
Ad reservation: 3/17/21
Ad material: 3/24/21
Mail date: 4/20/21

May–June

Investments

Publishes in June

HIGHLIGHTS

- Interest rates and inflation
- Mutual funds, CITs, ETFs
- Re-evaluating TDFs/managed accounts/QDIAs
- Private equity and other non-traditional asset classes
- ESG investing
- Fixed income
- Retirement income products

RESEARCH

- DCIO Survey

Sponsored reservation: 4/13/21
Ad reservation: 5/14/21
Ad material: 5/21/21
Mail date: 6/17/21

July–August

Growing Your Practice

Publishes in August

HIGHLIGHTS

- Defining your client target market
- Expanding coverage
- Advertising and marketing best practices
- Showing your value in RFPs
- M&A
- Managing referrals
- Managing team and client growth

RESEARCH

- Small Plan Services Survey

Sponsored reservation: 6/18/21
Ad reservation: 7/12/21
Ad material: 7/19/21
Mail date: 8/17/21

September–October

Managing Provider Relationships

Publishes in October

HIGHLIGHTS

- Matching client needs with provider solutions
- Determining who does what across client relationships
- Choosing and monitoring plan investments
- Financial wellness
- Participant education
- Innovative savings, providers and opportunities
- Recordkeeper selection/ monitoring

RESEARCH

- Retirement Plan Adviser Survey

Sponsored reservation: 8/20/21
Ad reservation: 9/16/21
Ad material: 9/23/21
Mail date: 10/21/21

November–December

Practice Management

Publishes in December

HIGHLIGHTS

- Taking stock of your practice post-pandemic
- Succession planning
- Diversity and inclusion
- Building a team culture
- Dividing roles and responsibilities
- Adviser compensation
- In-house vs. outsourced tools/ services

RESEARCH

- Practice Benchmarking Survey

Sponsored reservation: 10/15/21
Ad reservation: 11/10/21
Ad material: 11/17/21
Mail date: 12/16/21

Exclusive sponsorships of Online Special Coverage and Research on PLANADVISER.com available.

Sponsorship includes roadblock of banner ads on all survey pages (728 x 90 and 300 x 250 banner units).

**This calendar is subject to change.*

Magazine Display Advertising

MAGAZINE ADVERTISING RATES

4-Color Process	
Full Page	
Two-Page Spread	
Premium Positions	
Cover 2 *Inside front cover*	
Cover 3 *Inside Back Cover*	
Cover 4 *Outside Back*	
Opposite TOC; EIC Letter; or Managing Editor Letter	
Specialty Covers	
Cover 2 Spread *Inside front two pages*	
Tip-On/False Cover *Two pages*	
Gatefold *Three pages*	

2020 MAGAZINE CLOSING DATES

Issue	Reservations	Materials
January / February	1/15/21	1/22/21
March / April	3/17/21	3/24/21
May / June	5/14/21	5/21/21
July / August	7/12/21	7/19/21
September / October	9/16/21	9/23/21
November / December	11/10/21	11/17/21

Magazine Display Advertising *Specifications*

PRODUCTION DETAILS

Advertising Units

Unit	Vertical	Horizontal
2-pg spread, live area	—	15.5" x 9. 875"
2-pg spread, bleed	—	16.75" x 11.125"
Live area, no bleed	7.25" x 9.875"	—
Full pg, bleed	8.5" x 11.125"	—
Trim size	8.25" x 10.875"	—

Tone Density

- 2-color: The sum percentage of tone values should not exceed 170% and only one color may be solid.
- 4-color: The sum percentage of the tone values should not exceed 300% and no more than one color may be solid.

Digital PDF-X 1A Format Specifications *Native files are not acceptable.*

- If you are creating PDF files for magazine ads in InDesign, Illustrator, or QuarkXpress 7, you can export PDF files directly from the application. (You should use a "PDF/X" or "High-Quality Press" factory preset.)
- We recommend that users of older versions of Quark create PDF files by writing Postscript files and distill them using Adobe Acrobat Distiller 7.0 or later.
- To guarantee that your PDFs are compliant with the PDF/X-1a, we recommend running a preflight check on your page-layout files, and a preflight on your final PDF file in Acrobat Professional using a PDF/X-1a profile. Supplied proofs must be printed from the final PDF file (not from page-layout file).

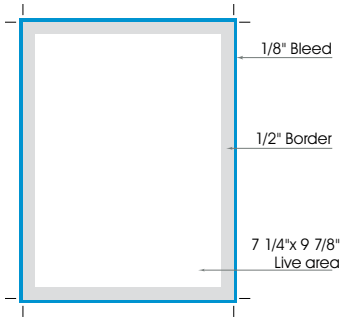
Materials

PLANADVISER / Attn: Donna Bien-Aimé
creative@issmediasolutions.com

Standard Unit Size

- Trim size: 8 1/4" x 10 7/8"
- Allow 1/8" on all sides for bleeds

Print Method: Web offset lithography
Cover Stock: 100# Matte
Text Stock: 45# Matte
Binding: Saddle Stitched



- Live area: No bleed size
- Border: Any text/image in this area is liable to be cut due to printer cutting variation.
- Bleed: Area to be cropped

Check List

- Correct page size
- 1/8" bleed
- All fonts are active (pay special attention to fonts used in EPS files)
- Both screen and printer fonts are available
- Fonts are not menu-styled
- All images are linked and updated
- Photo effective resolution for black and white line-art images should be more than 1200 dpi
- Images are either Grayscale or CMYK
- Resolution for gray scale and CMYK images should be at least 300 dpi
- Scans and illustrations are either TIFF or EPS
- Created color is CMYK (make sure "spot color" is not checked)
- Send hard copy SWOP proof with color bars and registration marks

Follow SWOP Standards and Specifications for advertising reproduction material and magazine Web offset printing unless otherwise specified. Ads that exceed specified size in any dimension are considered bleed or oversized, except spreads that bleed in the gutter. PDF-X1a files are the only acceptable material format. Hard copy SWOP proof with color bars and registration marks is recommended to ensure that materials run properly.

Digital Display Banners

ROS Display Units	Ad Sizes	Expandable	Expanded Size	Flight
Billboard	970x250	No	n/a	Variable
Super Leader	970x90	Yes	970x250	Variable
Leader	728x90	Yes	728x315	Variable
Portrait	300x1050	No	n/a	Variable
Jumbo Island	300x600	No	n/a	Variable
Island	300x250	Yes	300x600	Variable

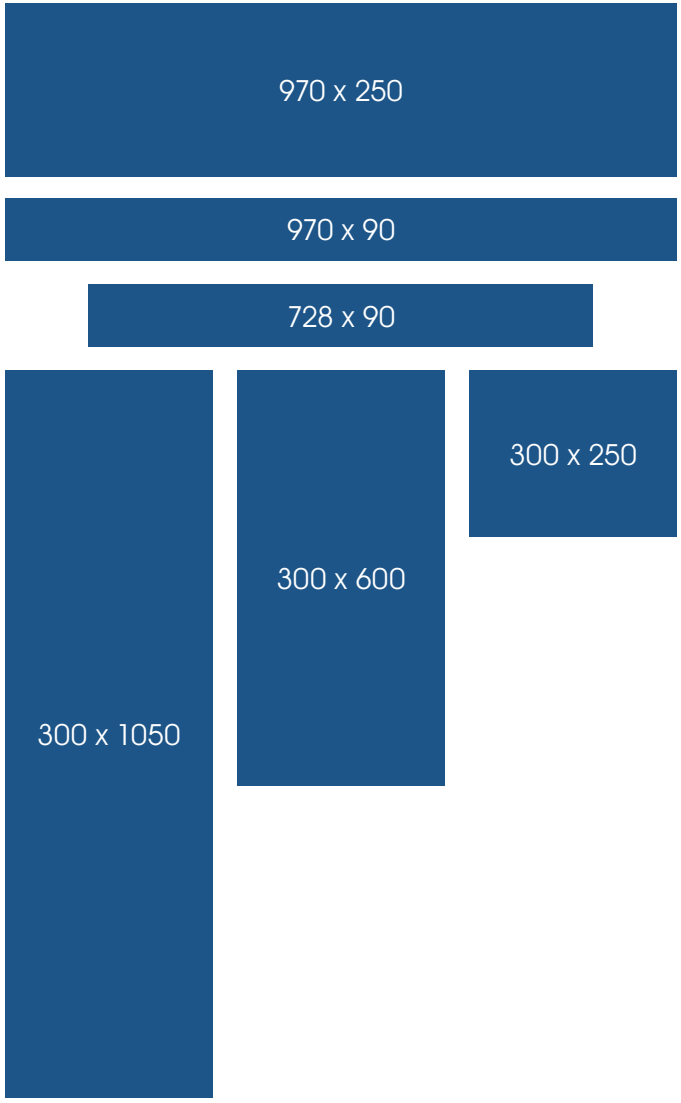
High-Impact Daily Units	Ad Sizes	Expandable	Expanded Size	Flight
Roller	16:9	No	n/a	Daily and Weekly
Welcome	600x400	No	n/a	Daily
Skin	1400x800	No	n/a	Daily
Pencil Pushdown	1040x60	Yes	1040x250	Daily
Flex	2000x300	No	n/a	Daily
Native In-Feed Text (top)	Text	No	n/a	Daily
Native In-Feed Text (bottom)	Text	No	n/a	Daily

Technical specifications for all units can be found at planadviser.com/advertise.

Monthly Averages
Unique Visitors: 43,500
Page Views: 137,500
Time spent on site: 1 minutes 40 seconds average (Google Analytics: 2020)

For more information, please contact your account manager.
Technical specifications for all placements are available upon request.
Please address all inquiries to advertise@issmediasolutions.com.

ROS Display Units

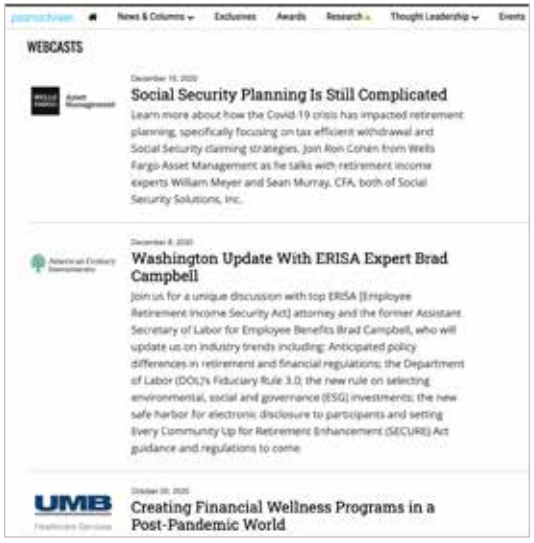


Webcasts*

Sponsored Webcasts are a unique way to get your message in front of a highly qualified audience.

Sponsored Webcasts allow you to share your company's insight while showcasing new solutions and ideas. Leverage the deep content knowledge of our PLANSPONSOR editorial team to build and present a webcast that aligns with your content goals while ensuring education of, and interest from, our readers. At PLANSPONSOR, our team works with you every step of the way to develop a content theme, identify speakers and moderate the session. If your content has already been recorded, the platform can be used to leverage our brand, audience and production capabilities.

- Promotional campaign to help build audience
- Brand extension options
- Downloadable assets such as white papers



**All topics need to be approved by publisher.*

Editorial Webinars

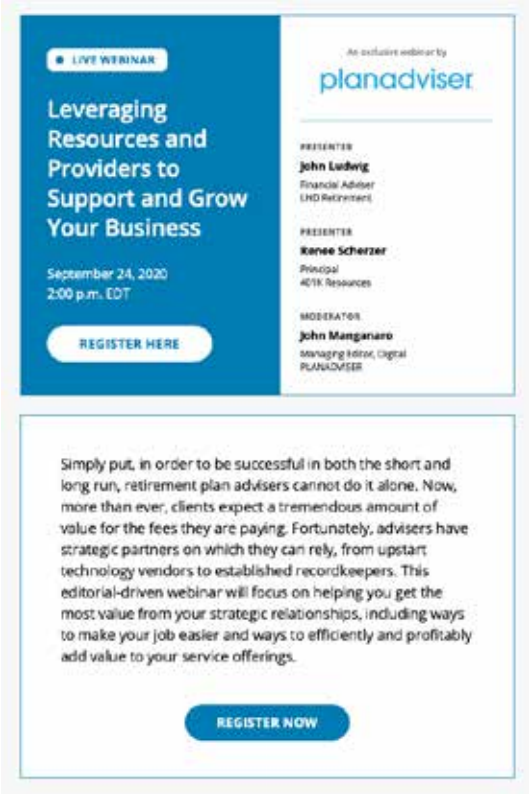
PLANADVISER Editorial Webinars are a unique way to get your brand in front of a highly qualified audience.

PLANADVISER Editorial Webinars are a unique branding opportunity to showcase your company alongside timely and relevant topics as covered by our award-winning editorial team. Our audience tunes in to hear our take on timely issues and news of what's happening in the industry. Align your brand with us as we explore a specific industry topic.

2021 Webinar Calendar*

January 12	When and How to Return to the Office
February 9	College Savings and Student Debt: 529 Plans, Student Loans and Financial Wellness
March 9	Artificial Intelligence and Financial Advice
April 13	ESG
May 11	Succession Planning and How to Retire as an Adviser
June 8	Evolution in the DCIO Provider Landscape
July 13	Micro Plans in Focus—Growing a Practice With Smaller Clients
August 10	The Future of Health Care—And What It Means for Retirement Planning
September 14	How to Lose a Client (Or Not)—Lessons Learned From Unsuccessful Advisory Relationships
October 12	Learning From PLANADVISER Retirement Plan Adviser Survey
November 9	How Has the Pep Marketplace Developed in Year One?
December 14	Steps to Advance Diversity in the World of Finance

See pages 5–6 for complete PLANSPONSOR editorial calendar.

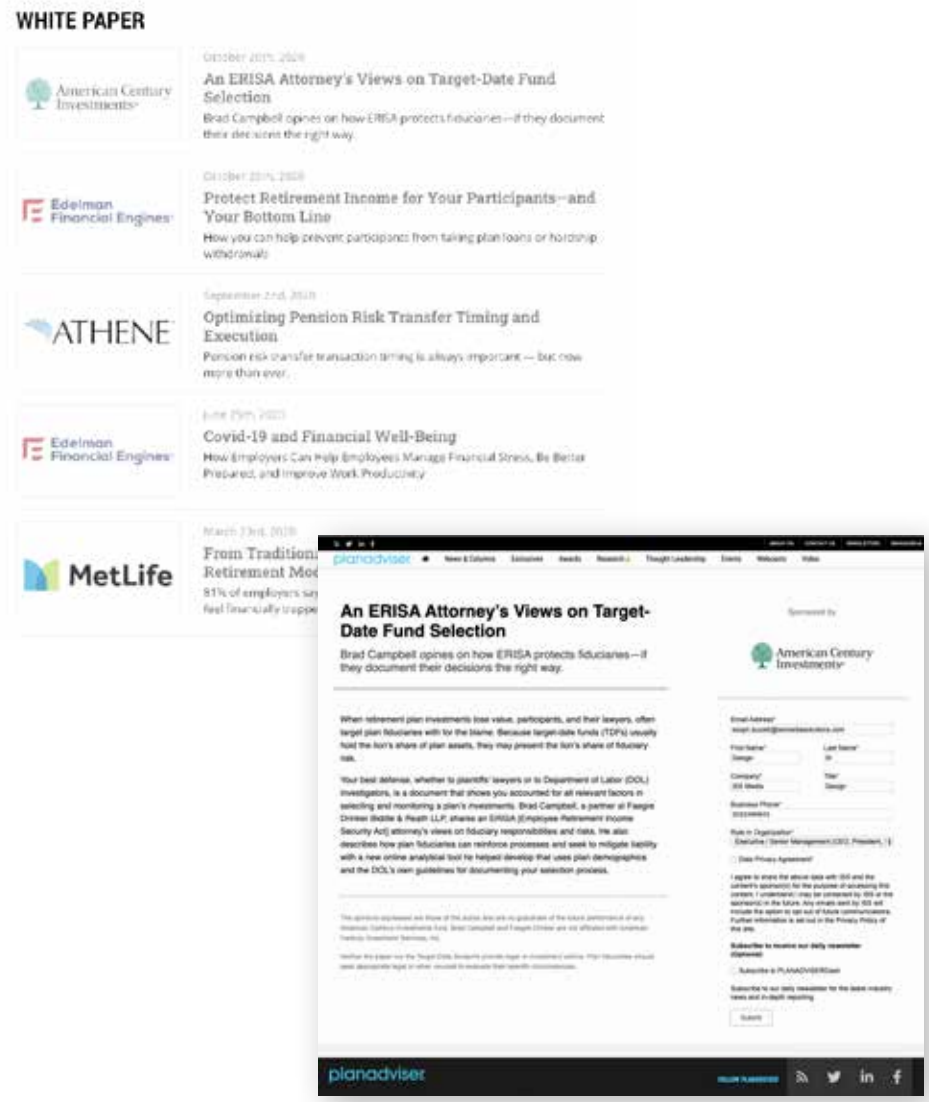


Featured White Paper Program

Leverage the power of our audience and use it as a lead generation platform to introduce and promote your firm's white papers.

Allowing our website to host and publicize your white paper delivers it to a wider audience, enhances its impact and strengthens your brand. Your white paper will be hosted on PLANADVISER.com for two months.

The content will be featured in our white paper section and promoted on our homepage in the Industry White Paper section, as well as promoted regularly during the sponsorship period via newsletters and display advertisements.



Sponsored Newsletter

Spotlight Newsletter

Circulation base: 16,250 subscribers

Position your messaging in front of our most engaged reader segments.Advertisers can select from a list of current topics chosen by our award-winning editorial team. As a sponsor of a topical special edition of PLANADVISER Spotlight, your advertising banner images and or sponsored message ads will appear next to contextually current and relevant content. These placements can be used to drive traffic to your research, white papers, videos or thought leadership.

SPOTLIGHT TOPICS

- **ESG** January 13; April 14; July 14; October 13
- **Financial Wellness: Defining and Delivering** January 27; April 28; July 28; October 27
- **Funds in Focus** February 10; May 12; August 11; November 10
- **PEPs, MEPs and PPPs** February 24; May 26; August 25; November 24
- **Solving Retirement Income** March 10; June 9; September 8; December 8
- **Advisers Giving Back** March 24; June 23; September 22; December 22

Supplied HTML Blast*

Send a targeted HTML Blast message to our core readers. You message will have 100% share of voice and will allow your firm to expand its presence, establish its expertise in a specific topic area and directly connect with our key audience.

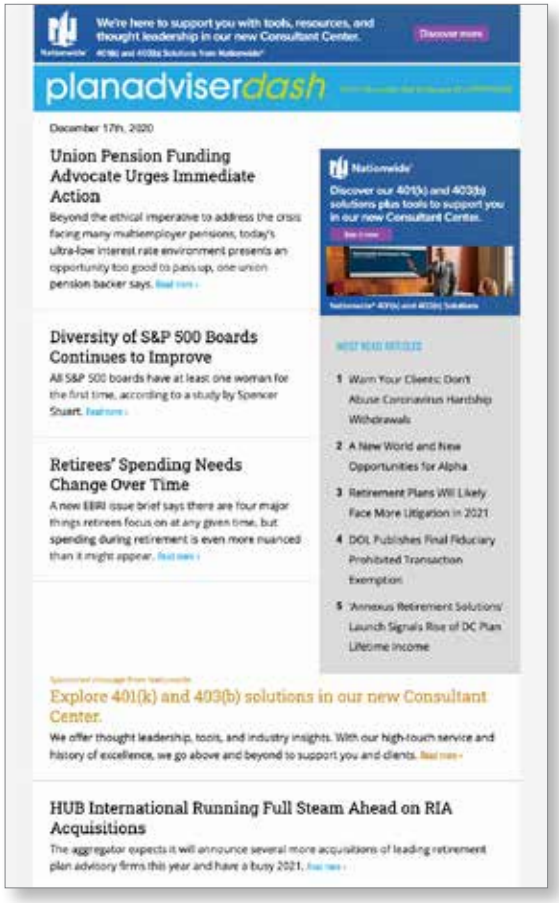
**All supplied in HTML format content needs to be approved by publisher.*

Editorial Newsletter Advertising

PLANADVISER Dash

Circulation base: 21,000 subscribers

PLANADVISER Dash is the daily email newsletter addressing specific needs and concerns of advisers specializing in the sale and servicing of institutional retirement plans. PLANADVISER Dash delivers industry-relevant news, timely and topical coverage of industry developments, as well as the latest trends from our proprietary research. Published each workday morning, PLANADVISER Dash focuses on ways to help the adviser succeed—leveraging the expertise and experience of the PLANADVISER franchise to provide the reader with practical and innovative adviser-centric solutions.



Thought Leadership

PLANADVISER offers multiple options to showcase your firm's experts and expertise. Thought leadership articles are published in PLANADVISER magazine and then posted on PLANADVISER.com and promoted on our website and in our newsletters. Whether you have content already created or need support to create the right message, PLANADVISER can help.

Conducted Thought Leadership

Using a moderated discussion between a senior PLANADVISER editor and key executives at your firm, we will write an article on a topic of compelling interest to the plan adviser community and elaborate on the characteristics that distinguish your firm from your competitors. This article will be designed by PLANADVISER with final approval from the client.

Supplied Thought Leadership

You provide PLANADVISER with content—to be approved and meet custom media standards—for your Thought Leadership article. Supplied content that is not printer ready is designed by PLANADVISER with final approval from the client. Supplied, printer-ready content is sent to PLANADVISER as a printer-ready PDF. PLANADVISER's Thought Leadership platform can also be used as a showcase for your video or podcast-based messaging. Digital only opportunities are available, as well as reprints.

Conferences

PLANADVISER hosts a series of industry-leading in-person and virtual conferences throughout the year. Join top industry experts and executives as they explore and discuss the most important topics and innovative products, bringing deep industry insights to plan adviser attendees. Our conferences accurately take the pulse of the industry, while our editors and moderators bring an unbiased approach and the highest quality content to these high-profile gatherings.

Be seen alongside the leaders of the industry by participating as a keynote speaker or as part of a compelling panel discussion. Take advantage of exceptional brand exposure before, during and after each conference. Make direct connections with key retirement benefit decisionmakers and influencers from across the country, whether at a live gathering or through our fast-paced virtual offerings.

Stand out as a leader in the retirement benefits community, put your company's insights in our spotlight and be where the action is. Join us in 2021!

2021 CONFERENCE CALENDAR

Building Your Best Practice in 2021
March 24, 2021 (Virtual)

HSA Conference
April 13–14, 2021 (Virtual)

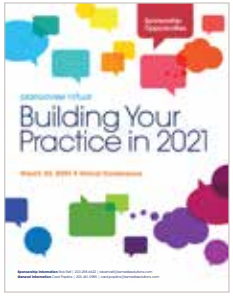
PLANSPONSOR National Conference
June 7–10, 2021 (Virtual)

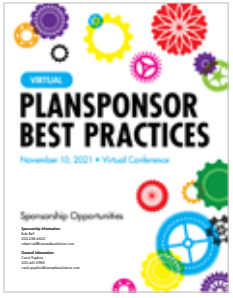
PLANADVISER National Conference
September 27–30, 2021 (Virtual)

HSA Review
October 13, 2021 (Virtual)

PLANSPONSOR Best Practices
November 10, 2021 (Virtual)

Detailed sponsorship packages available upon request.





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