

# planadviser®

---

## MEDIA KIT 2024



PLANADVISER is the independent voice providing deep insight into and analysis of the most pressing challenges and opportunities facing advisers and consultants who sell to and support employer-sponsored retirement programs and their participants.

With an eye toward how mergers and acquisitions are remaking the industry, we are a resource for the new generation of retirement plan advisers. We provide objective insight into all aspects of plan and participant service and investments, as well as practice management, including team building, mentorship, community building and DEI.

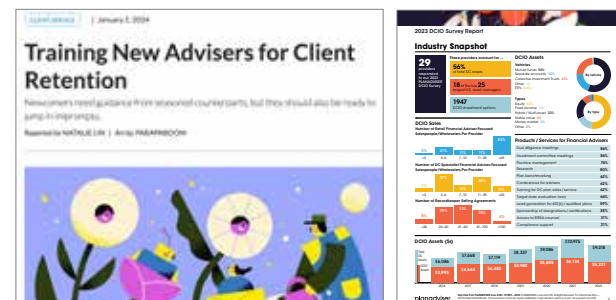
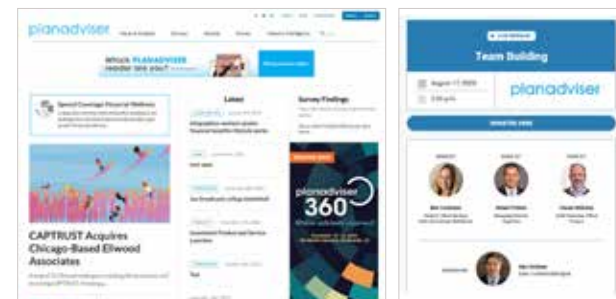
We identify and supply actionable insight to help advisers with business growth and client service through accurate and objective reporting; proprietary research; and opportunities to connect with and learn from skilled experts and peers at various events.





# Table of Contents

Product Summary .....	4
Calendar .....	5
Website Advertising .....	7
Content Sponsorships .....	10
Email Marketing .....	13
Industry Intelligence Programs .....	17
Webinars .....	20
Events & Conferences .....	24
Surveys .....	27
Award Programs .....	31
Contacts .....	34





# Products Summary

## Website

PLANADVISER.com provides deep insight into and analysis of the most pressing challenges and opportunities facing advisers and consultants who sell to and support employer-sponsored retirement programs and their participants. Put your brand in front of our audience of advisers who specialize in serving institutional retirement plans by reserving a spot to highlight your products, services and expertise on our website.



## Newsletters

The daily PLANADVISERdash email newsletter reaches plan advisers of all types, as well as their provider partners. Bimonthly, our Spotlight newsletter delivers a blast of information focused on a specific theme relevant to plan advisers. PLANADVISER also delivers Breaking News alerts to our audience's inboxes. Each present an opportunity to increase familiarity with your brand in the retirement plan advisory industry.



## Industry Intelligence

PLANADVISER can host and publicize your firm's white papers and videos/podcasts on our website and publish thought leadership articles on our website to help showcase your firm's experts and expertise to a broad audience.



## Webinars

Through sponsored and editorial webinars, PLANADVISER offers insights and education about retirement plan sponsor and participant relationships, investments, compliance, as well as advisory practice management. Establish your firm as a go-to resource by hosting a discussion or associating your brand with one of our themed webinar events.



## Conferences

PLANADVISER hosts an industry-leading national conference featuring subject matter experts, as well as multiple themed livestreamed events throughout the year. Showcase your firm's expertise, products and services through one of many event partnership opportunities.



## Surveys

PLANADVISER's surveys provide a comprehensive view of the retirement plan advisory and investment industry. We offer a strong array of industry studies and market guides. Align with our brand by sponsoring one of our annual surveys, accessing our proprietary data programs, or pulsing our audience through custom research.



## Awards

PLANADVISER's various awards programs recognize the overall retirement plan adviser and product and service provider communities. Participation in our awards programs and awards events highlights the support you provide to your clients as well as the plan sponsor and adviser communities.





# planadviser®

---



## 2024 Calendar



# 2024 Calendar

## January

### SPECIAL COVERAGE

- Client Retention 1/2

### SPOTLIGHT NEWSLETTERS

- Participant Services and Financial Wellness 1/10
- Retirement and Wealth (RIA) Convergence 1/24

## February

### SPECIAL COVERAGE

- Managed Accounts 2/1

### SPOTLIGHT NEWSLETTERS

- Defined Contribution Investment Only and Investment Menus 2/14
- Retirement Coverage Gap 2/28

### SURVEY

- 2023 Retirement Plan Adviser Survey 2/6

### WEBINAR

- Retirement and Wealth (RIA) Convergence 2/8

## March

### SPECIAL COVERAGE

- Retirement and Wealth (RIA) Convergence 3/1

### SPOTLIGHT NEWSLETTERS

- Retirement Income 3/13
- Team Management 3/27

### AWARDS

- Retirement Plan Adviser of the Year Finalists
- Top Retirement Plan Advisers

### WEBINAR

- SECURE 2.0 Act 3/21

## April

### SPECIAL COVERAGE

- Diversity, Equity, and Inclusion 4/1

### SPOTLIGHT NEWSLETTERS

- Participant Services and Financial Wellness 4/10
- Retirement and Wealth (RIA) Convergence 4/24

### AWARDS

- Vision Award
- Adviser Choice Award

## May

### SPECIAL COVERAGE

- Plan Design Innovation 5/1

### SPOTLIGHT NEWSLETTERS

- DCIO and Investment Menus 5/8
- Retirement Coverage Gap 5/22

### AWARDS

- Retirement Plan Adviser of the Year Winners

### CONFERENCES AND EVENTS

- Advisers in Conversation and Industry Leader Awards  
New York, NY, 5/8

## June

### SPECIAL COVERAGE

- The Rothification of Retirement 6/3

### SPOTLIGHT NEWSLETTERS

- Retirement Income 6/12
- Team Management 6/26

### SURVEY

- Adviser Value Survey 6/11

## July

### SPECIAL COVERAGE

- Participant Service 7/1

### SPOTLIGHT NEWSLETTERS

- Participant Services and Financial Wellness 7/10
- Retirement and Wealth (RIA) Convergence 7/24

### SURVEY

- DCIO Survey 7/9

## August

### SPECIAL COVERAGE

- Retirement Plan Litigation 8/1

### SPOTLIGHT NEWSLETTERS

- DCIO and Investment Menus 8/14
- Retirement Coverage Gap 8/28

### SURVEY

- Adviser Services Survey 8/6

## September

### SPECIAL COVERAGE

- Plan Cybersecurity 9/3

### SPOTLIGHT NEWSLETTERS

- Retirement Income 9/11
- Team Management 9/25

### AWARDS

- Emerging Leaders

### WEBINAR

- DCIO and Investment Menu Survey 9/24

## October

### SPECIAL COVERAGE

- DCIO and Investment Menus 10/1

### SPOTLIGHT NEWSLETTERS

- Participant Services and Financial Wellness 10/9
- Retirement and Wealth (RIA) Convergence 10/23

## November

### SPECIAL COVERAGE

- Multiple Employer Plans, Pooled Employer Plans and Startup Plans 11/1

### SPOTLIGHT NEWSLETTERS

- DCIO and Investment Menus 11/13
- Retirement Coverage Gap 11/27

### SURVEY

- Retirement Plan Adviser Survey 11/12

### CONFERENCES AND EVENTS

- PLANADVISER 360  
Scottsdale, AZ, 11/11–11/13

## December

### SPECIAL COVERAGE

- 2024 In Review 12/2

### SPOTLIGHT NEWSLETTERS

- Retirement Income 12/11
- Team Management 12/18

### SURVEY

- Practice Benchmark Survey 12/10

### WEBINAR

- 2024 In Review 12/18



# planadviser®

---



## Website Advertising



# Website Display Advertising

ROS Display Units	Ad Sizes	Expandable	Expanded Size	Flight	Rates				
					Viewable CPM	100% Viewable US ROS	70% Viewable US ROS	US ROS	ROS
Billboard	970x250	No	n/a	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M
Super Leader	970x90	Yes	970x250	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M
Leader	728x90	Yes	728x315	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M
Portrait	300x1050	No	n/a	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M
Jumbo Island	300x600	No	n/a	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M
Island	300x250	Yes	300x600	Variable	Yes	\$247/M	\$221/M	\$168/M	\$139/M

High-Impact Daily Units	Ad Sizes	Expandable	Expanded Size	Flight	Rate
Roller	16:9	No	n/a	Daily and Weekly*	\$2,050*
Welcome	600x400	No	n/a	Daily	\$2,050
Skin	1400x800	No	n/a	Daily	\$2,050
Wallpaper	5:1	No	n/a	Daily	\$2,050
Pencil Pushdown	1040x60	Yes	1040x250	Daily	\$2,050
Native In-Feed Text (top)	Text	No	n/a	Daily	\$1,650
Native In-Feed Text (bottom)	Text	No	n/a	Daily	\$1,125

Technical specifications for all units can be found at [planadviser.com/advertise](https://planadviser.com/advertise).

\*Weekly pricing available



# Website Display Advertising

## Run of Site Advertising

Supercharge your brand visibility with our Run of Site Advertising on PLANADVISER.com! Harnessing the broadest exposure, ROS placements feature multiple ad sizes per position on every page.

## Welcome Ad

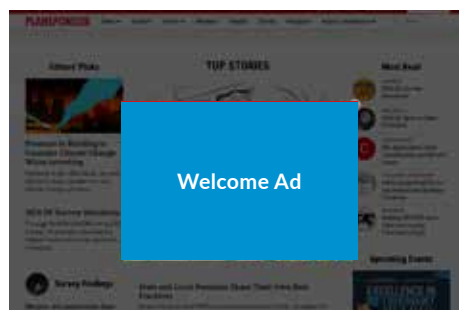
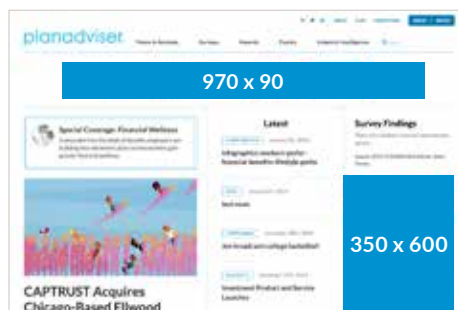
Generate even more visibility for your brand with our Welcome Ad—a dynamic 600x400 unit that commands attention on the first page a visitor comes to on planadviser.com. This high-impact ad immerses users, taking over as the primary content and requiring closure for content access. This opportunity has limited availability and is typically served with a frequency cap of 1x/day.

## Roller 2.0 Ad

Dominating over 30% of the page real estate, this enhanced ad experience delivers a responsive panoramic display, it captivates with images or videos, immersing viewers in your brand message. As users scroll, the creative morphs into a persistent banner, keeping your message top of mind. This high-impact, interactive ad demands engagement as users navigate the compelling content on planadviser.com.

## Wallpaper

Elevate your digital presence with our captivating Wallpaper advertising opportunity! Immerse our audience in your brand message with this high-impact experience by customizing the background graphics on our website for desktop users. This dynamic unit isn't just visually appealing – it's clickable, empowering you to direct users to your site and drive engagement.



Technical specifications for all units can be found at [planadviser.com/advertise](https://planadviser.com/advertise).





---

## Content Sponsorships



# Online Special Content Sponsorship (100% SOV)

Each month, our editors delve into a key topic to engage our audience. As the exclusive sponsor of this digital editorial content, your brand message takes center stage. Online special coverage (OSC) sponsorships include banner ad roadblocks on related pages, inclusion in PLANADVISER newsletters and LinkedIn posts.

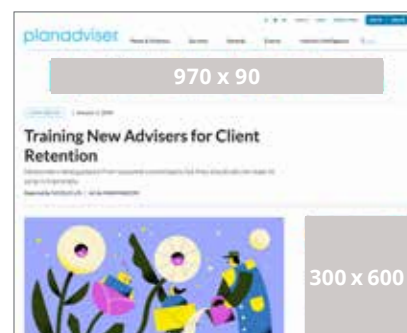
**New in 2024**, each Special Content topic kicks off with three pieces, followed by three additional sponsored content pieces throughout the month, culminating in a roundup email from the PLANADVISER editorial team at the end of the first sponsorship month

## 2024 Online Special Content Topics

January	Client Retention
February	Managed Accounts
March	Retirement and Wealth (RIA) Convergence
April	Diversity, Equity and Inclusion
May	Plan Design Innovation
June	The Rothification of Retirement Plans
July	Participant Services
August	Retirement Plan Litigation
September	Plan Cybersecurity
October	DCIO and Investment Menus
November	Multiple Employer Plans, Pooled Employer Plans and Startup Plans
December	2024 In Review

## OSC Content Promotion:

- Posts on the PLANADVISER LinkedIn page (5x/2-month sponsorship)
- Featured in newsletters throughout first month
- Promotion placement on Homepage



## Investment

2-month sponsorship: \$5,500  
*Note: sponsorship is of the same topic/content. Your branding stays with the initial OSC.*

## Display Ad Options

Content sponsorships include banner and island ads on all pages, including the OSC landing page during the first month. Note that multiple sizes for each position are acceptable and will rotate throughout the sponsorship period.

## Leaderboard options:

- 728 x 90
- 970 x 90
- 970 x 250

## Island options:

- 300 x 250
- 300 x 600
- 300 x 1050



# Featured Research/Survey Analysis (100% SOV)

Multiple times a year, PLANADVISER showcases the results of our surveys in print and on our website. As the exclusive sponsor of the digital survey coverage, your brand messaging will surround the results with leaderboard creative on every page of the in-depth coverage on PLANADVISER.com. The featured research/survey coverage is promoted on the homepage, in our newsletters and on our LinkedIn page.

## 2024 Surveys

Retirement Plan Adviser Survey (2023) *February 6*

Adviser Value Survey\* *June 11*

DCIO Survey\* *July 9*

Adviser Services Survey *August 6*

Retirement Plan Adviser Survey (2024)\* *November 12*

Practice Benchmark Survey *December 10*

**\*New in 2024 for these surveys only:** if the sponsorship is confirmed while the survey is in the field, you can present the research findings to the survey participants with your logo on the cover and a full-page ad in the pdf report they receive for participating. Commitment dates for inclusion in participant results for these topics:

- Adviser Value Survey: Monday, April 8, 2024
- DCIO Survey: Monday, May 6, 2024

## Promotion of survey content includes:

- Promotion on the PLANADVISER LinkedIn page (5x/2-month sponsorship)
- Promotion placement on Homepage
- Featured in newsletters throughout first month

## Investment

2-month sponsorship: \$5,500

## Display Ad Options

Featured research and survey coverage sponsorships include banner ads on all pages.

Note that multiple sizes for each position are acceptable and will rotate throughout the sponsorship period.

## Leaderboard options:

- 728 x 90
- 970 x 90
- 970 x 250





# planadviser®

---



## Email Marketing



# Editorial Newsletter Advertising

## PLANADVISERdash

21,349 subscribers (27.6% open rate)

PLANADVISERdash is the daily email newsletter addressing specific needs and concerns of advisers specializing in the sale and servicing of institutional retirement plans. PLANADVISERdash 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, PLANADVISERdash 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.

## PLANADVISER Breaking News

22,433 subscribers (31.2% open rate)

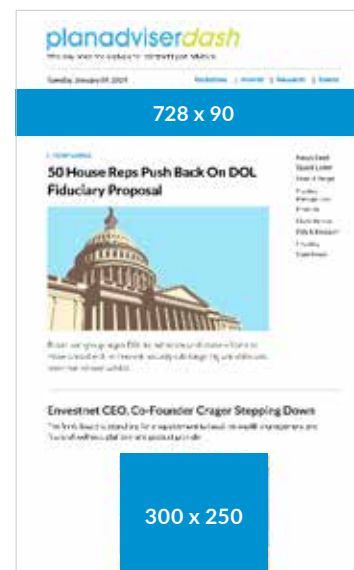
PLANADVISER's Breaking News email keeps our readers up to date on the topics that matter most to them. Sponsorship of the Breaking News series includes a minimum of three emails per quarter. Additional emails are delivered as a bonus to the sponsor.

## Single-Sponsored Supplied HTML Blast\*

18,491 subscribers (20.6% open rate)

Send a targeted HTML Blast message to our core readers. This single-sponsored email allows your firm to expand its presence, establish its expertise in a specific topic area and directly connect with our key audience.

\*All content supplied in HTML format requires publisher approval.



## PLANADVISERdash Banner Ads

- Leader (728x90): \$1,500
- Island (300x250): \$1,500
- Native sponsored messages:
  - Top: \$1,500
  - Bottom: \$1,000
- 100% SOV Roadblock: \$4,000

## Breaking News Banner Ads

- 100% SOV with two ad sizes
  - 728x90
  - 300x250
- Quarterly Sponsorship: \$10,000

## Supplied HTML Email

- \$15,000



# Editorial Newsletter Advertising

## PLANADVISER Spotlight Newsletter

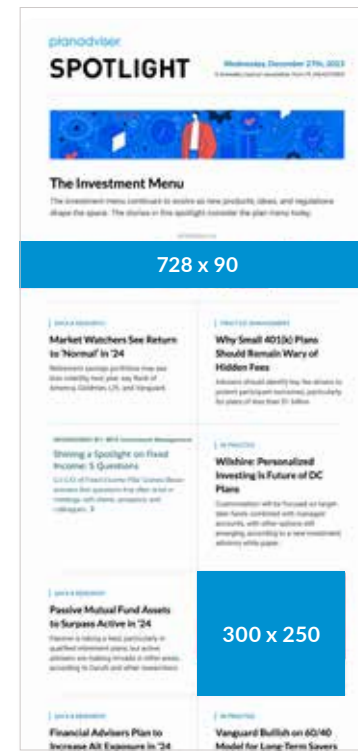
16,411 subscribers (24.1% open rate)

Each year, PLANADVISER Editors identify six topics to explore through our Spotlight Newsletter series. The topics rotate on a bi-weekly basis allowing our editors to take a focused, and deep, approach to creating new content and aggregating recent content to provide robust insights on the designated topic. As the 100% SOV sponsor of this newsletter, your brand message will be front and center with a 728x90 ad unit, a 300x250 ad unit and a native text ad.

**NEW in 2024!** PLANADVISER will welcome topic suggestions from our valued clients resulting in up to four additional Spotlight series. For this opportunity, our editorial team will work closely with clients to confirm the viability of the topic and the frequency of distribution. Custom Spotlight Newsletters are available for delivery on weeks when the standard Spotlight Newsletters are not deployed.

### Spotlight Topics

- **Participant Service and Financial Wellness**  
January 10, April 10, July 10, October 9
- **Retirement and Wealth (RIA) Convergence**  
January 24, April 24, July 24, October 23
- **Defined Contribution Investment Only and Investment Menus**  
February 14, May 8, August 14, November 13
- **Retirement Coverage Gap**  
February 28, May 22, August 28, November 27
- **Retirement Income**  
March 13, June 12, September 11, December 11
- **Team Management**  
March 27, June 26, September 25, December 18



### Spotlight Newsletter

#### Scheduled Topics:

- 1x sponsorship: \$10,000
- Spotlight Topic Takeover: \$30,000 (Buy 3, get 4th one free)

#### Custom Topics:

- 1x sponsorship: \$12,500
- Custom Topic Takeover: \$37,500 (Buy 3, get 4th one free)

#### Ad Units included:

- 728 x 90
- 300x250
- Native Text



# Supplied Newsletter

## Supplied HTML Blast\*

18,491 subscribers (20.6% open rate)

Send a targeted HTML Blast message to our core readers. This single-sponsored email allows your firm to expand its presence, establish its expertise in a specific topic area and directly connect with our key audience.

\*All content supplied in HTML format requires publisher approval.



## Investment

Supplied HTML Blast: \$15,000



# planadviser®

---



## Industry Intelligence Programs



# Thought Leadership

PLANADVISER offers multiple options to showcase your firm's experts and expertise. Unleash the power of your insights with PLANADVISER's Thought Leadership platform.

## Conducted Thought Leadership

Participate in a focused discussion led by PLANADVISER Custom Content Manager and your key executives. We'll craft an article on topic of your choosing, highlighting what distinguishes your firm. PLANADVISER will meticulously design the digital content which will be published on planadviser.com for two months, maximizing your reach.

## Supplied Thought Leadership

Supply your own thought leadership content to PLANADVISER, meeting our custom media standards and our expert team will convert your insights into an impactful article. Upon your approval, your unique perspective will be featured on PLANADVISER.com for two months.

Enhance your impact by utilizing our Thought Leadership platform for supplied video or podcast messaging, leaving a lasting impression on our audience for two months.

## Thought Leadership Marketing Campaign

- Promoted in newsletters via our Industry Intel Round Up widget (1x/month)
- Promoted in a standalone Industry Intel Brief newsletter (1x/month)
- Promotion on PLANADVISER LinkedIn account (1x/month)
- Regular promotion in newsletters and on planadviser.com via native sponsored messages (created by PLANADVISER)



## Investment

- Editorially conducted: \$17,000
- Supplied: \$12,500
- Supplied video / podcast:: \$12,500

*Note: All topics require publisher approval. Pricing is based on 650 – 800 words of copy, not including standard disclosure language. Content longer than 800 words will be charged an incremental fee of \$1,325 for up to 800 additional words.*



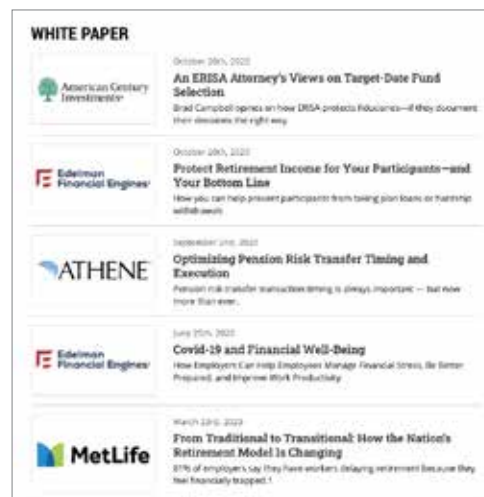
# White Papers

Showcase your white paper on planadviser.com to offer comprehensive insights, strategic solutions, and authoritative perspectives that will empower our audience to make informed decisions and optimize the performance of their plans. If desired access to the full content of your white paper can be gated behind a simple registration wall for lead generation.

We will host and promote your white paper to deepen engagement, increase awareness and strengthen perception of your firm and its areas of expertise. Your white paper will be hosted on planadviser.com for two months.

## White Paper Marketing Campaign

- Promoted in newsletters via our Industry Intel Round Up widget (1x/month)
- Promoted in a standalone Industry Intel Brief newsletter (1x/month)
- Promotion on PLANADVISER LinkedIn account (1x/month)
- Regular promotion in newsletters and on planadviser.com via native sponsored messages (created by PLANADVISER)



## Investment

\$7,400



# planadviser®

---



## Webinars



# Editorial Webinars

Elevate your brand to new heights with PLANADVISER Editorial Webinars—an unparalleled opportunity to align with our editors and a specific webinar topic. As one of just three exclusive sponsors, your brand will have prominent exposure on the invitations, pre-conference slide show, opening slides and thank you slide at the close of the webinar. Our webinar topics capture the attention of a highly qualified audience eager to stay ahead in an ever-evolving industry.

As a bonus, sponsors receive the attendee list including email addresses.

## 2024 Webinar Topics

Retirement and Wealth (RIA) Convergence *February 8*

SECURE 2.0 Act *March 21*

DCIO and Investment Menu Survey *September 24*

2024 in Review *December 18*

### Sponsorship Elements Include:

- Logo inclusion on invitations and on zoom registration page
- One dedicated slide (16:9) in the pre-conference slide show
- Logo featured on opening slide to showcase sponsors
- Logo with click-thru URL for the closing slide and downloadable materials
- Promotion on the PLANADVISER LinkedIn page



### Investment

\$9,500



# Client-Centric Webinars

**NEW in 2024:** There are three ways to share your company's insight and expertise while showcasing new solutions and ideas to the PLANADVISER audience. In each single-sponsored opportunity, our consultative approach allows you to suggest the topic for editorial approval. The final format of the webinar is up to you.

## Partnered Webinars

Collaborate with PLANADVISER's editorial team to develop a content theme aligning with your goals. PLANADVISER editors will moderate throughout the webinar, showcasing a true partnership.

## Sponsored Webinars

Work with our team to ensure your topic engages and educates our readers. PLANADVISER introduces and concludes the webinar, while you lead the main discussion. Our team can moderate the Q&A session and run polling if desired.

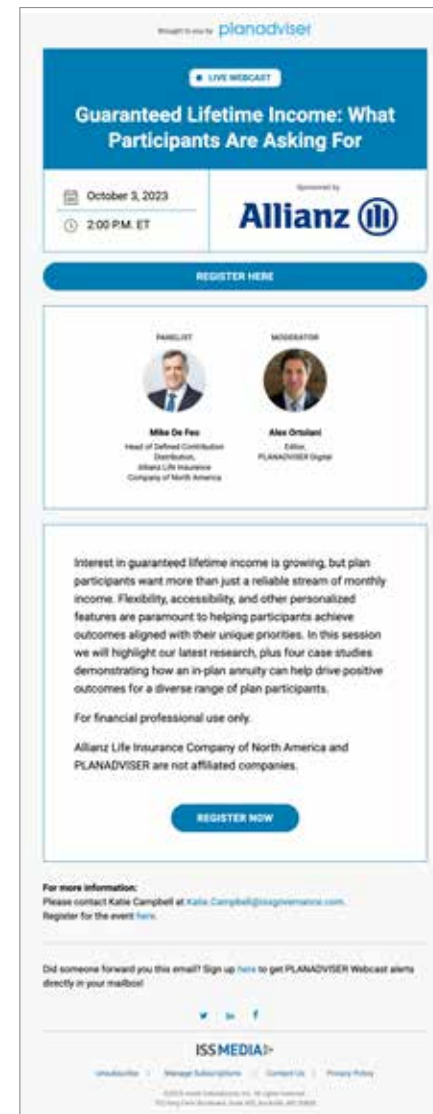
## Supplied Webinars

With approved topic and content, PLANADVISER takes a hands-off approach. Your pre-recorded content is the focus.

## Regardless of format, each non-editorial webinar includes

- Dedicated email invitations for our audience
- Optional HTML invite with trackable link created for you to send to your clients
- Listing on our website under upcoming webinars
- Promotion on the PLANADVISER LinkedIn page
- Inclusion in our monthly email summary of upcoming events, if confirmed in time
- Ability to include downloadable materials
- Shared list of registrations and attendees
- Shared list of post-webinar on-demand views

*\*All client-centric webinars require editorial approval, a kick-off call, and a 30-minute prep call.*



## Investment

Client-Centric Webinar: \$25,000

## Audience Extension (optional)

Expand your reach to the retirement plan adviser or institutional investment communities by including a second promotional campaign to the audience of one of our sister brands, PLANSPONSOR or CIO. Your webcast will be promoted through email, newsletters, and website channels with the same consistency as your campaign via PLANADVISER.

## Additional Investment (per brand)

- January–August: \$10,000
- September–December: \$15,000



# Multi-Sponsored “Roundtable” Webinars

**NEW in 2024:** Introducing a dynamic live-streamed opportunity where three industry powerhouses unite to delve into a pivotal topic, spotlighting their expertise. Guided by a seasoned PLANSPONSOR content editor, these new roundtable webinars promise more than just insights—they’re enlightening discussions that unveil potential solutions your organization brings to the forefront.

## Suggested Topics and Dates\*:

- **Development in CIT’s** April 18
- **Lifetime Retirement Income** August 22
- **Managed Accounts** October 17

*\*Suggested dates and topics, however, PLANADVISER will welcome topic suggestions and dates. Topics must be approved by PLANADVISER.*

## Each Multi-Sponsored Roundtable Webinar includes:

- Dedicated email invitations for our audience
- Optional HTML invite with trackable link created for you to send to your clients
- Listing on our website under upcoming webinars
- Inclusion in our monthly email summary of upcoming events, if confirmed in time
- Promotion on the PLANADVISER LinkedIn page
- Ability to include downloadable materials
- Shared list of registrations and attendees
- Shared list of post-webinar on-demand views

## Investment

\$19,000 per sponsor

*(Minimum of 2 sponsors required, maximum of 3 sponsors allowed per roundtable event)*

## Extensions

Maximize the impact of the multi-sponsored roundtable webinar by transforming its insightful content into a thought leadership or white paper product. Crafted by the Chief Investment Officer Content Studio, this turnkey opportunity harnesses the transcripts of the roundtable discussion, complemented by an optional interview or Q&A session. Available at a discounted price if booked within 30 days of the Roundtable Webinar.



# planadviser®

---



## Event & Conferences



# Ways to Engage with Our Audience

PLANADVISER's in-person events offer a dynamic platform for education, thought-provoking discussions, vibrant debates and valuable networking experiences, fostering a sense of community. Engage with attendees by contributing to panel discussions, showcasing compelling case studies or research findings. Maximize your brand exposure through 100% SOV sponsorship options, including strategic placement in all ad positions and featured rich media video content in planned post-event coverage.

## In-person event sponsorship opportunities include:

- **Content Delivery:** keynote, case study, research presentation or panel participation
- **Branding Exposure:** invitations, on-site and during-event push notifications
- **Lead Generation:** registration list pre- and post-event
- **Event Promotion:** special invitations to share with your clients/colleagues and social media assets to post about your event affiliation

## Expand promotion of your brand and expertise with these additional opportunities:

- Event content-related Thought Leadership (video, podcast or article)
- Print creative (branded or sponsored content)
- Sponsored webinar
- Sponsorship of post-event coverage with branded content and social elements





## 2024 Event Overviews

### PLANADVISER Advisers in Conversation

May 8, 2024 / The Lighthouse, Pier 61, New York, NY

In the afternoon prior to our annual PLANADVISER Industry Leader Awards Dinner, PLANADVISER will host topical roundtables providing insights and knowledge that today's retirement plan advisers need. 2024 Retirement Plan Adviser of the Year finalists will share insights and knowledge about how to capitalize on the evolution of participant services, help client plan sponsors become better fiduciaries and create a culture of mentorship and collaboration.

### PLANADVISER Industry Leader Awards Dinner

May 8, 2024 / The Lighthouse, Pier 61, New York, NY

This networking event will celebrate the best and brightest of the retirement plan adviser industry. During the PLANADVISER Industry Leader Awards Dinner, we will recognize the finalists and winners of the Retirement Plan

Adviser of the Year Awards, the additions to the Top Retirement Plan Advisers list and providers that received PLANADVISER Adviser Choice Awards. We will also name the latest recipients of the PLANADVISER Vision Award, commending the inspirational and industry-shaping accomplishments of retirement industry innovators.

### PLANADVISER 360

November 10-13, 2024 / The Westin Kierland, Scottsdale, AZ

In a networking-friendly environment, plan advisers who attend PLANADVISER 360 will be able to engage directly with skilled experts and leading advisers for sharing ideas about how to differentiate their practice and add value for clients. Peers will share success stories and providers will discuss the newest platforms, tools and services for advisers and their clients. The comprehensive agenda also includes insights and optimal practices for constructing investment menus, building practices and establishing the best service models and pricing, as well as complying with the various laws and regulations applicable to plan advisers and their practices.





# planadviser®

---



## Surveys



## Surveys

Each year, PLANADVISER conducts industry-specific surveys that inform our editorial efforts, equipping our audience with vital industry trends, benchmarks, and data essential for achieving their business objectives. Our survey reporting not only showcases key highlights within the magazine but also delves deeper into the findings on our website and offers additional insights, commentary, and editorial support through our e-commerce reports.

**As a marketing partner, there's opportunity to be associated with our surveys via:**

- Participating in appropriate surveys (sign up [here](#))
- Becoming the 100% SOV sponsor of our online results (see page 11)
- Purchasing datasets and reprints of reports
- Commissioning a custom survey (see page 30)

PLANADVISER  
DCIO Survey



PLANADVISER  
Adviser Value Survey



PLANADVISER  
Practice Benchmarking  
Survey





PLANADVISER Brand Surveys

Retirement Plan Adviser Survey

The Retirement Plan Adviser survey asks advisers about their preferences when evaluating investments, asset managers and recordkeepers. The survey also ranks providers by adviser interactions, recommendations and highest rated areas of service.

2023 Fielded: October; Published: February  
2024 Fielded: August; Published: November

Adviser Value Survey

For the PLANADVISER Adviser Value Survey, defined contribution plan sponsors answer questions about contributions an adviser might have made to their plan. Responses indicated whether the use of an adviser, and, if so, which type—e.g., fiduciary or non-fiduciary—influenced the plan’s offerings, services and best practices.

Published: June

DCIO Survey

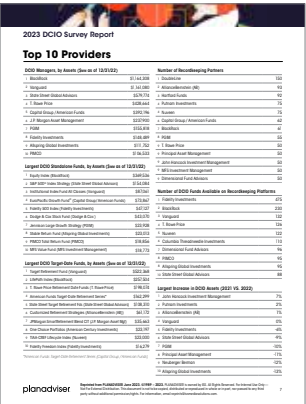
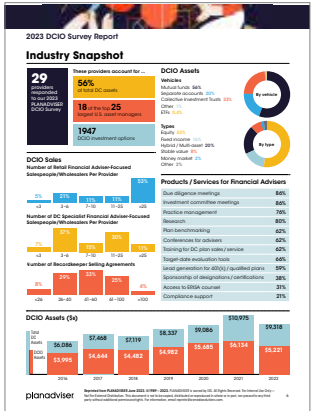
An update of the state of the defined contribution investment only market. The DCIO survey includes provider rankings and services offered to advisers.

Fielded: April; Published: July

Practice Benchmarking Survey

PLANADVISER’s annual report on how retirement plan advisers run their practices, particularly with respect to recommending funds, providing individual advice to plan participants and serving as a fiduciary.

Fielded: August (as part of Retirement Plan Adviser Survey);  
Published: December





# Custom Survey Capabilities

Unlock exclusive access to the PLANADVISER audience. Available on a limited basis, our surveys team will work with you to create a custom survey to the Chief Investment Officer audience. This turnkey opportunity covers every aspect, from confirming your goals and survey objectives, segmenting our audience to reach your target respondents, and programming the actual survey to following up with participants, analyzing the data, and fulfilling any incentives. It is designed to provide the insights your brand needs.

## Additional Details

- Limited availability: One survey per quarter for the same target audience.
- First-come, first-served basis.
- Surveys team collaborates on target audience and response/sample size goal.
- PLANADVISER team deploys the survey to the targeted audience, clearly indicating sponsorship.
- Additional media purchases (white papers, thought leadership) available at a discounted rate.
- Final survey questions needed at least 30 days before survey fielding.

## Investment

- Pricing starts at \$72,900
- 50% non-refundable deposit required for custom options.
- Included elements: audience access, sample procurement, invitation design/deployment, data collection/cleaning, incentive fulfillment, and raw data file.
- Custom research requires an incremental media buy (webinar, thought leadership, white paper, etc.).

## Pricing Variables

- Level of targeting (including screening questions).
- Additional survey length (beyond 15 minutes).
- Number of invitations/reminders above standard (1 invitation, 2 reminders).
- Response sample size larger than 100 (billed per complete).
- Participant incentive for qualified, complete responses (billed at cost).
- Analysis and insights presented in a formally designed presentation.



# planadviser®

---



## Awards Programs



# Annual Awards

PLANADVISER celebrates industry excellence through various awards programs and lists. Participation is free. Honorees are recognized at events and are featured within digital content. Award recipients can purchase logos and other items to showcase their achievement. All finalists and listmakers are recognized, and winners are announced, at the Advisers in Conversation and Industry Leader Awards on May 8 in New York City.

## planadviser. Industry Leader Awards





# 2024 Award Programs

All finalists and listmakers are recognized, and winners are announced, at the Advisers in Conversation and Industry Leader Awards on May 8 in New York City.

## Retirement Plan Adviser of the Year

PLANADVISER Retirement Plan Adviser of the Year finalists and winners have demonstrated leadership and a commitment to excellence in serving retirement plan sponsors and participants and contributing to the retirement plan adviser industry.

*Nominations Open: October 2023 – January 2024*  
*Finalists Announced: March*  
*Winners Announced: May*

## Top Retirement Plan Advisers

Each year PLANADVISER recognizes the top retirement plan advisers in the industry based on quantitative measures, including amount of AUA and number of plans under advisement. Advisers are highlighted if they have what was designated as a special focus in any particular plan type, if they are women and if they are younger than 40.

*Nominations Open: January*  
*Listmakers Announced: March*

## Vision Awards

The PLANADVISER Vision Awards celebrate those industry leaders—one individual and one group—who have propelled positive outcomes and whose work of key leaders and change-makers has played a major role in shaping the retirement plan industry of today.

*Recipients Announced: April*

## Adviser Choice Awards

The Adviser Choice Awards recognize retirement specialist advisers' most favored investment and recordkeeping providers. The awards are given to those investment and recordkeeping providers that achieved the three highest scores in two or more of the product and/or service categories for which data was gathered in the most recent PLANADVISER Retirement Plan Adviser Survey.

*Recipients Announced: April*

## PLANADVISER Emerging Leaders

Emerging Leaders are early-career advisers who stand to become industry leaders and changemakers someday.

*Nominations Open: July*  
*Listmakers Announced: September*





# Contacts

## *Sales and Marketing*

**Rob Reif**

+1 212-217-6906

[robert.reif@issmediasolutions.com](mailto:robert.reif@issmediasolutions.com)

[advertise@issmediasolutions.com](mailto:advertise@issmediasolutions.com)

## Publisher

**Alison Cooke Mintzer**

+1 646-308-2756

[alison.mintzer@issmediasolutions.com](mailto:alison.mintzer@issmediasolutions.com)

[editors@issmediasolutions.com](mailto:editors@issmediasolutions.com)