20th ANNIVERSARY

planadviser®

2026 MEDIA KIT

ISSMIMEDIA

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.

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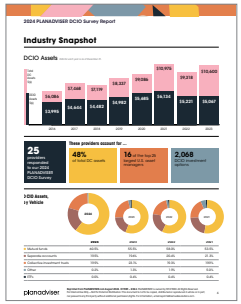

Products Summary

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

Audience

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Audience Profile

Digital Traffic *(monthly)*

69,888 *digital users*

114,638 *page views*

1:46 *session duration*

39.6% *engagement rate*

Traffic by Platform *(monthly)*

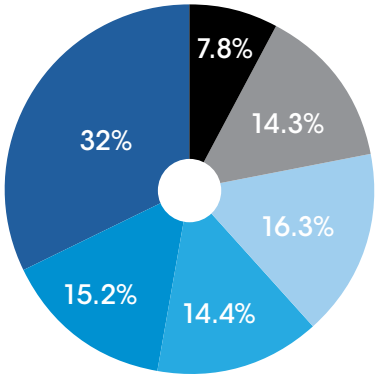
73.5% *desktop*

25.5% *mobile*

1.1% *tablet*

Total Client Retirement Plan Assets

- <$1M
- $1M – $10M
- $10M – $50M
- $50M – $200M
- $200M – $1B
- >$1B



Source: Google Analytics, rolling year through 11/30/25; Subscriber file as of November 2025.

Role in Industry

Retirement plan adviser/consultant	59.7%
Service provider	13.7%
Other retirement/benefits plan staff	7.1%
Asset/Investment manager	2.8%
Recordkeeper/Third-party administrator (TPA)	2.3%
Legal counsel	1.3%
CPA/Accountant/Actuary	0.7%
Other	12.4%

Types of Plans Served

401(k) Plan	68.5%
Defined Benefit	46.9%
403(b) Plan	39.7%
Non-Qualified Deferred Compensation Plan	38.0%
457 Plan	27.4%
Cash Balance / Hybrid Plan	16.3%
529 or Other College Savings Plan	11.1%
Health Savings Account	10.7%
Foundation, Endowment, Family Office	1.4%
Other Defined Contribution	8.3%
Other Types of Retirement Plans	5.8%

Calendar

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2026 planadviser Media Kit

20th ANNIVERSARY

January

SPECIAL COVERAGE
- Retirement Income Planning

SPOTLIGHT NEWSLETTERS
- Retirement Income *1/14*
- AI and Technology for Advisers *1/28*

February

SPECIAL COVERAGE
- Artificial Intelligence

SPOTLIGHT NEWSLETTERS
- Retirement and Wealth Convergence *2/11*
- Participant Service *2/25*

AWARDS
- Retirement Plan Adviser of the Year Finalists

SURVEY
- Adviser Value

March

SPECIAL COVERAGE
- Health Care and Holistic Benefits Advising

SPOTLIGHT NEWSLETTERS
- Investment Evolution and Innovations *3/11*
- Practice Management and Succession Planning *3/25*

AWARDS
- Top Retirement Plan Advisers

WEBINAR
- Showcasing Adviser Value *3/11*

April

SPECIAL COVERAGE
- Practice Management

SPOTLIGHT NEWSLETTERS
- Retirement Income *4/8*
- AI and Technology for Advisers *4/22*

AWARDS
- Vision Awards
- Adviser Choice

May

SPECIAL COVERAGE
- Lifecycle of Financial Advice

SPOTLIGHT NEWSLETTERS
- Retirement and Wealth Convergence *5/13*
- Participant Service *5/27*

FEATURED SURVEY
- Adviser Value Survey *5/5*

AWARDS
- Retirement Plan Adviser of the Year Winners

IN-PERSON EVENTS
- PLANADVISER Advisers in Conversation & PLANADVISER Industry Leader Awards *New York, NY, 5/14*

June

SPECIAL COVERAGE
- Roth and Tax Diversification in Retirement

SPOTLIGHT NEWSLETTERS
- Investment Evolution and Innovations *6/10*
- Practice Management and Succession Planning *6/24*

SURVEY
- DCIO *6/2*

WEBINAR
- The Recordkeeping Landscape *6/10*

July

SPECIAL COVERAGE
- Provider Relationships

SPOTLIGHT NEWSLETTERS
- Retirement Income *7/8*
- AI and Technology for Advisers *7/22*

August

SPECIAL COVERAGE
- DCIO and Investment Menu Innovations

SPOTLIGHT NEWSLETTERS
- Retirement and Wealth Convergence *8/12*
- Participant Service *8/26*

AWARDS
- Emerging Leaders
- Excellence In Operations

September

SPECIAL COVERAGE
- Expanding Coverage – PEPs, Startups and Micro Plans

SPOTLIGHT NEWSLETTERS
- Investment Evolution and Innovations *9/9*
- Practice Management and Succession Planning *9/23*

WEBINAR
- Broadening the Appeal of the Industry *9/9*

October

SPECIAL COVERAGE
- Managed Accounts

SPOTLIGHT NEWSLETTERS
- Retirement Income *10/14*
- AI and Technology for Advisers *10/28*

SURVEY
- Practice Benchmarking *10/6*

November

SPECIAL COVERAGE
- Trends in Practice Compliance

SPOTLIGHT NEWSLETTERS
- Retirement and Wealth Convergence *11/11*
- Participant Service *11/24*

SURVEYS
- Retirement Plan Adviser Survey *11/2*

IN-PERSON EVENT
- PLANADVISER 360 *Orlando, FL, 11/8 – 11/11*

December

SPECIAL COVERAGE
- Rollovers and Participant Services

SPOTLIGHT NEWSLETTERS
- Investment Evolution and Innovations *12/9*
- Practice Management and Succession Planning *12/23*

More detailed timing for Surveys on page 35 and Awards on page 39. (As of December 10, 2025. This calendar is subject to change.)

Integrated Solutions

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Integrated Solutions

This media kit offers an overview of our robust advertising capabilities, but it's only the beginning. The real impact comes from partnering with us to create a custom, integrated marketing plan tailored to meet your objectives and fit your budget.

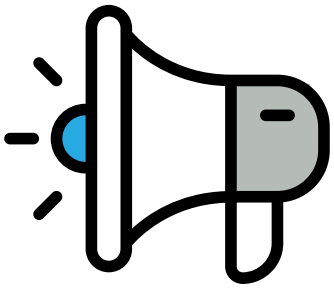
Whether your goal is to:

- Build brand awareness
- Drive traffic to your website
- Generate qualified leads
- Showcase your industry expertise

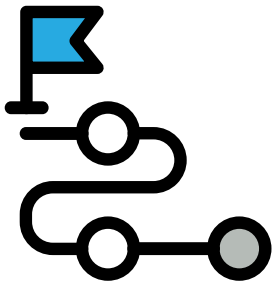
We are committed to creating campaigns that resonate and deliver results.

Throughout this media kit, you'll find icons that align each opportunity with these goals, providing a clear path to success. We're excited to collaborate with you to help achieve your marketing goals!

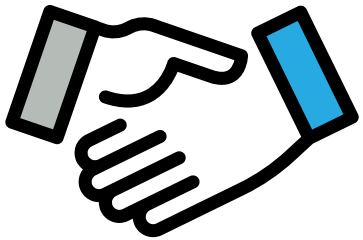
Build brand awareness



Drive traffic to your website



Generate qualified leads



Showcase your industry expertise

Build Trust with Retirement Plan Advisers.
Build Momentum. Deepen Connection. Maximize Impact.

Advisers thrive on relationships and reliability. A consistent presence with PLANADVISER helps your brand become a familiar and trusted voice in their professional journey. Whether you're educating or influencing, regular engagement builds trust and keeps your brand top of mind.

We're here to help you make the most of your media dollars. With frequency discounts available across select opportunities, your investment goes further—delivering more visibility, more value, and more impact.
For each opportunity, when you purchase 3, the 4th will be FREE!

Make your media work harder:

- High-Impact Digital Ad Units p. 13, 14
- Online Special Content p. 16, 17
- Email Marketing p. 23, 24
- Industry Intel p. 26, 27
- Client-Centric Webinars p. 30

Website Display Advertising

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Website Display Advertising

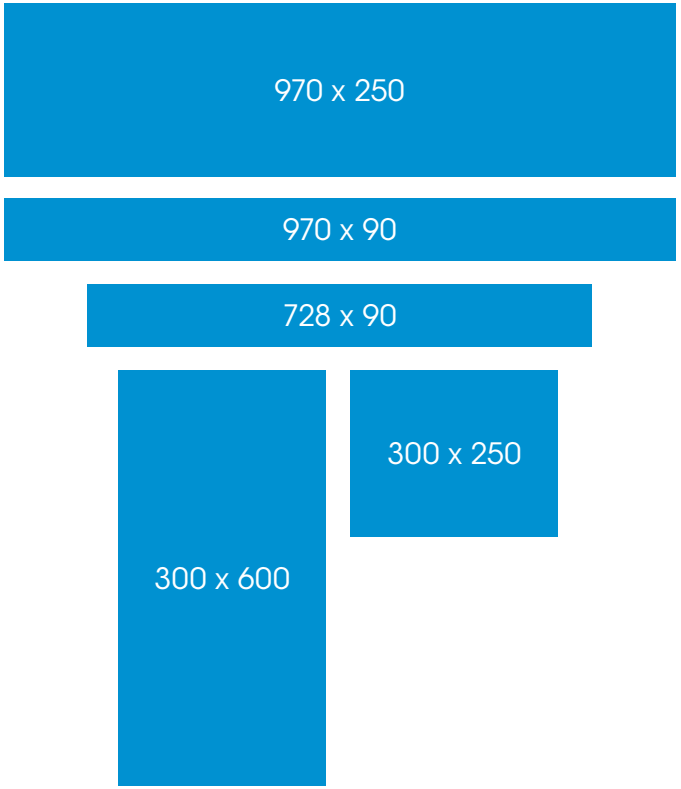
ROS Display Units	Ad Sizes	Expandable	Expanded Size	Flight
Billboard	970x250	No	n/a	Variable
Super Leader	970x90	Yes	970x250	Variable
Leader	728x90	Yes	728x315	Variable
Jumbo Island	300x600	No	n/a	Variable
Island	300x250	Yes	300x600	Variable

High-Impact Daily Units	Ad Sizes	Expandable
Adaptive Roller	16:9	No
Roller 2.0	16:9	No
Welcome	600x400	No
Skin	1400x800	No
Native In-Feed Text (top)	Text	No
Native In-Feed Text (bottom)	Text	No

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

Frequency Discount: Buy 3, get 4th free.

ROS Display Units



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 across all device platforms.

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 sees on PLANADVISER.com. This high-impact ad immerses users, taking over as the primary content and requiring closure for access to other content. This opportunity has limited availability and is typically served with a frequency cap of 1x/day.

Roller Ad

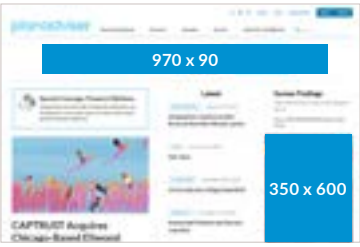
Dominating over 30% of the page real estate, this enhanced ad experience delivers a responsive panoramic display. It captivates with images or videos, immersing viewers in your brand message. This high-impact, interactive ad demands engagement as users navigate to the compelling content on PLANADVISER.com. Positioned at the top of the homepage, this unit has a frequency cap of 1x/day.

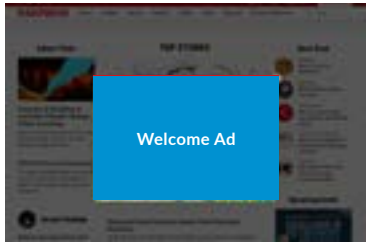
Adaptive Scroller Ad

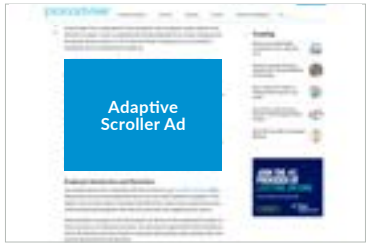
Like the roller ad, the adaptive scroller ad displays on the page as the user scrolls through the content, creating a high-profile viewing opportunity. The difference with this unit is that it's positioned within editorial content—displaying fully before the user continues reading. This placement is ideal for static images or video content and does not require a frequency cap.

Interactive Skins

Immerse our audience in your brand message with this high-impact experience by customizing the background graphics on our homepage 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.

Content Sponsorships

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Online Special Coverage Sponsorship (100% SOV)

FREQUENCY DISCOUNT

Each month, our editors provide in-depth coverage of a topic of importance to our audience. As the exclusive sponsor of this digital editorial content, your brand and message would be featured prominently. Online special coverage (OSC) sponsorships include banner ad roadblocks on related pages and roadblock ad units on special Spotlight newsletter.

Each Special Coverage package kicks off at the beginning of the month with three articles, followed by three additional content pieces throughout the month, culminating in a special Spotlight email from the PLANADVISER editorial team on the last Friday of the month.

2026 Online Special Coverage Topics

January	Retirement Income Planning
February	Artificial Intelligence
March	Health Care and Holistic Benefits Advising
April	Practice Management
May	Lifecycle of Financial Advice
June	Roth and Tax Diversification in Retirement
July	Provider Relationships
August	DCIO and Investment Menu Innovations
September	Expanding Coverage – PEPs, Startups and Micro Plans
October	Managed Accounts
November	Trends in Practice Compliance
December	Rollovers and Participant Services

Promotional Elements Include:

- Posts on the PLANADVISER LinkedIn page (2x/2-month sponsorship)
- Promotion of content topic on the homepage
- Featured in at least one newsletter during the first month of sponsorship
- Dedicated Spotlight newsletter

Investment

- 2-month sponsorship
- Frequency Discount: Buy 3, get 4th free

Note: sponsorship is of the same topic/content. Your branding stays with the initial OSC.

Display Ad Options

Coverage sponsorships include banner and island ads on all pages.
A Native Text Ad is included on the content landing page for the first sponsorship 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

Special Spotlight newsletter elements:
- 728 x 90

Native content
- 300 x 250

Promotional Elements Include:
- Promotion on the PLANADVISER LinkedIn page (2x/2-month sponsorship)
- Promotion of content topic on the homepage
- Featured in at least one newsletter during the first month of sponsorship
- Dedicated Spotlight newsletter

Online Special Coverage Topics

FREQUENCY DISCOUNT

January

Retirement Income Planning

From managed accounts to insurance products to distribution options—the best strategies and solutions advisers use to secure lasting retirement income for their clients.

Spotlight newsletter: January 30

February

Artificial Intelligence

What technology, cybersecurity and artificial intelligence-driven knowledge is crucial for firms to acquire as AI continues to disrupt both the retirement and advisory industries.

Spotlight newsletter: February 17

March

Health Care and Holistic Benefits Advising

How to communicate with participants about planning for health care in retirement; how to education plan sponsors about the fiduciary requirements of their health plans.

Spotlight newsletter: March 27

April

Practice Management

Strategies for supporting your advisory practice's growth, efficiency and seamless succession.

Spotlight newsletter: April 24

May

Lifecycle of Financial Advice

Tailoring advice across generations; preparing for the historic generational wealth transfer.

Spotlight newsletter: May 29

June

Roth and Tax Diversification in Retirement

Considering tax planning strategies for retirement, including the use of, and distributions from, Roth plans; tax-efficient retirement plan saving and distribution solutions.

Spotlight newsletter: June 26

July

Provider Relationships

Building strong, effective partnerships with the providers that support your practice and plan clients.

Spotlight newsletter: July 31

August

DCIO and Investment Menu Innovations

Fresh insights about investment menu options and defined contribution investment only strategies.

Spotlight newsletter: August 28

September

Expanding Coverage – PEPs, Startups and Micro Plans

Supporting plan availability expansion, from large pooled employer plans to startup and micro plans.

Spotlight newsletter: September 25

October

Managed Accounts

Innovative solutions for personalized retirement outcomes.

Spotlight newsletter: October 30

November

Trends in Practice Compliance

Staying ahead of evolving compliance and regulatory requirements—from the SEC and Financial Industry Regulatory Authority, to state requirements, to the Department of Labor.

Spotlight newsletter: November 20

December

Rollovers and Participant Services

Solutions that enhance participant engagement and retirement readiness, plus guide retiring participants and clients through rollovers and qualified plan transitions.

Spotlight newsletter: December 18

Featured Survey Analysis (100% SOV)

Multiple times a year, PLANADVISER showcases the results of our surveys on our website.

As the exclusive sponsor of the digital survey coverage, your brand and message will surround the results with leaderboard creative on every page of the in-depth coverage on PLANADVISER.com. The featured survey coverage is promoted on the homepage, in our newsletters and on our LinkedIn page.

2026 Surveys

- Adviser Value Survey (February)
- DCIO Survey (June 2)
- Practice Benchmarking Survey (October 6)
- Retirement Plan Adviser Survey (November 2)

Promotion of survey content includes:

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

Investment

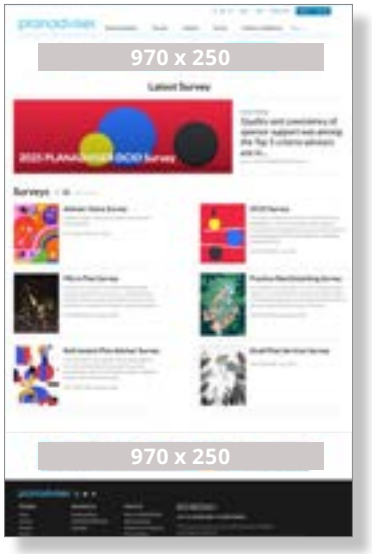
2-month sponsorship

Display Ad Options

Featured 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



Social Media Marketing

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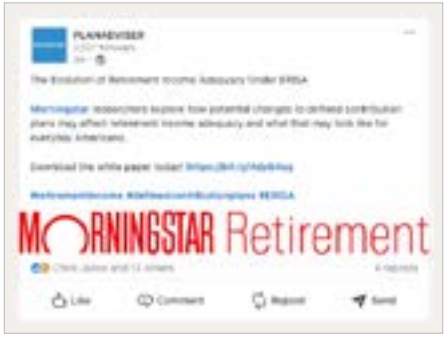
Social Media

Extend your brand's reach beyond our core website with our new, sponsored posts on LinkedIn.

Sharing your invitation or thought leadership with our LinkedIn audience is now available. You provide the image and proposed copy; we'll make sure it matches our brand tone and then post it at a specific date/time for maximum engagement. Our growing audience is deeply engaged in our posts and our partner posts.

Ideal for:

- Webinar invitations
- Thought leadership amplification
- Brand awareness with strong call to action messaging



Email Marketing

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Editorial Newsletter Advertising

PLANADVISERdash

29,924 subscribers +11.4% growth (34.7% 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

31,424 subscribers +1.7% growth (41.3% 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.

Source: PLANADVISER Subscriber File as of 12/31/24

Editorial Newsletter Advertising

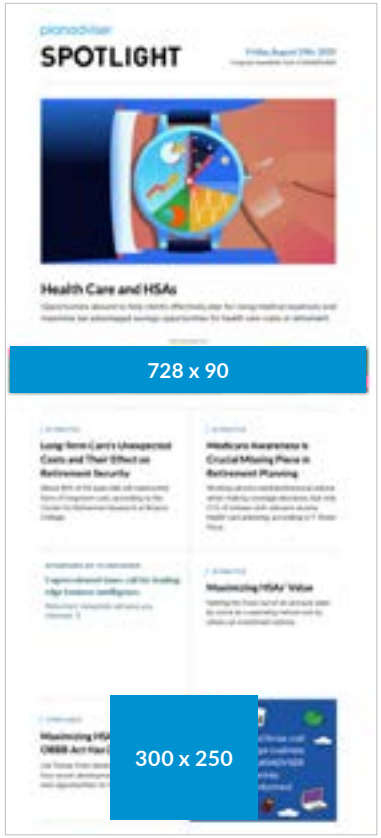
FREQUENCY DISCOUNT

PLANADVISER Spotlight Newsletter

23,927 subscribers +26.4% growth (38.7% 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 and message will be front and center with a 728x90 ad unit, a 300x250 ad unit and a native text ad.

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

- **Retirement Income**
  January 14, April 8, July 8, October 14
- **AI and Technology for Advisers**
  January 28, April 22, July 22, October 28
- **Retirement and Wealth Convergence**
  February 11, May 13, August 12, November 11
- **Participant Service**
  February 25, May 27, August 26, November 24
- **Investment Evolution and Innovations**
  March 11, June 10, September 9, December 9
- **Practice Management and Succession Planning**
  March 25, June 24, September 23, December 23

Source: PLANADVISER Subscriber File as of 12/31/24

Supplied Newsletter

FREQUENCY DISCOUNT

Supplied HTML Blast*

18,027 subscribers (35.8% 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. Invitations to participate in client research are not permitted.*

Source: PLANADVISER Subscriber File as of 12/31/24

Industry Intelligence Programs

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Thought Leadership

FREQUENCY DISCOUNT

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

Editorially Conducted Thought Leadership

Participate in a focused discussion led by PLANADVISER's Custom Content Manager with your key executives. We'll craft an article on the 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. Videos and podcasts can be natively distributed on the PLANADVISER LinkedIn channel.

Featured Reprints

Harness the power of PLANADVISER reprints to amplify your firm's message, product and services from your thought leadership and build stronger connections with your target audience. With your articles featured on PLANADVISER, this will help tell your story and lend credibility to your promotions.

Thought Leadership Marketing Campaign

- Promoted in newsletters via our Industry Intel Round Up widget *(1x/month)*
- Promoted in a standalone Industry Intel Brief newsletter *(2nd Wednesday of every month)*
- Promoted on PLANADVISER LinkedIn account *(1x/month)*
- Promoted in newsletters and on planadviser.com via native sponsored messages created by PLANADVISER *(1x/month)*

White Papers

FREQUENCY DISCOUNT

Generate leads while you 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 their value to clients.

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 *(2nd of every month)*
- Promoted on PLANADVISER LinkedIn account *(1x/month)*
- Promoted in newsletters and on planadviser.com via native sponsored messages created by PLANADVISER *(1x/month)*

Featuring HTML Advantage

Introducing a companion HTML email to drive even greater engagement with your white paper content. We share the names and emails of those who open your dedicated email and click to the landing of your white paper, providing you with additional soft leads.

Note: All topics require approval by our PLANADVISER Custom Content Manager.

Webinars

planadviser

Editorial Webinars

PLANADVISER Editorial Webinars are a unique opportunity to align your brand with a specific webinar topic. As one of just three exclusive sponsors, your brand will have prominent exposure on the invitations, in the pre-conference waiting room and on the opening slide. Our webinar topics capture the attention of a highly engaged audience eager to stay ahead in an ever-evolving industry. As a bonus, webinar sponsors receive a list of attendees with email addresses.

2026 Webinar Topics *Topics and dates subject to change.*

- **Showcasing Adviser Value** *March 11*
  Take an in-depth, exclusive look at how advisers drive retirement plan success.
- **The Recordkeeping Landscape** *June 10*
  A deep dive into who the providers are—and a look at which ones lead in various segments—in the recordkeeping business.
- **Broadening the Appeal of the Industry** *September 9*
  Hear from emerging leaders about why they joined the business, and how the industry can attract more young talent.

Sponsorship Elements Include:

- Logo inclusion on invitations and on zoom registration page
- One dedicated slide (16:9) in the pre-conference waiting room
- Logo featured on opening slide
- Ability to provide branded downloadable materials
- Promotion on the PLANADVISER LinkedIn page

Client-Centric Webinars

FREQUENCY DISCOUNT

There are four formats to share your company's insight and expertise while showcasing trends, research, new solutions or strategies to the PLANADVISER audience. In each opportunity, our consultative approach offers insights on your suggested topic to meet your goals and best engage the audience. The topic must receive editorial approval, and you can select one of four formats for the event.

Partnered Webinars

A PLANADVISER editor will moderate throughout the webinar, showcasing a true partnership.

Sponsored Webinars

PLANADVISER introduces and concludes the webinar, while your experts 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.

Multi-Sponsored Webinars

These dynamic livestreamed discussions feature up to three sponsors whose experts delve into a topic of high interest to the PLANADVISER audience. Once the topic is finalized, each sponsor can provide one expert to participate in the discussion and PLANADVISER will take it from there. We write the content description, develop the invitation and secure additional speakers. Minimum of two sponsors required.

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

Regardless of format, each client-centric 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 both the Events and Industry Intelligence tabs
- Promotion on the PLANADVISER LinkedIn page
- Inclusion in our monthly Industry Intel Brief email newsletter
- Ability to provide branded downloadable materials
- List of registrants and attendees with email addresses
- List of post-webinar on-demand attendees with email addresses

Audience Extension (optional)

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

Additional Investment (per brand)

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

Product Extensions (optional)

Maximize the impact of your client-centric webinar by transforming its insightful content into a Thought Leadership article. Crafted by the PLANADVISER 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 in combination with the sponsored webinar

Events

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Ways to Engage with Our Audience

PLANADVISER's in-person events offer education, thought-provoking discussions and valuable networking experiences, fostering a sense of community. Engage with attendees by contributing to panel discussions, showcasing compelling case studies or sharing 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 with email addresses pre- and post-event
- Event Promotion: special invitations to share with your clients/colleagues and social media assets to post about your event affiliation

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

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

Event Overviews

PLANADVISER Advisers in Conversation

May 14, 2026 / CURRENT at Pier 59, New York, NY

In the afternoon prior to our annual PLANADVISER Industry Leader Awards Dinner, PLANADVISER will host topical discussions, facilitated by advisers and Editorial staff, providing insights and knowledge that today's retirement plan advisers need. 2025 Retirement Plan Adviser of the Year finalists will help facilitate discussions about how to capitalize on the evolution of participant services, help plan sponsor clients become better fiduciaries and create an advisory firm culture of mentorship and collaboration.

PLANADVISER Industry Leader Awards Dinner

May 14, 2026 / CURRENT at Pier 59, 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 announce the winners of the Retirement Plan Adviser of the Year Awards and recognize 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 8 – 11, 2026 / Ritz-Carlton Orlando Grande Lakes, FL

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, establishing the best service models and pricing, and complying with the various laws and regulations applicable to plan advisers and their practices. The 2025 PLANADVISER Emerging Leader listmakers will be celebrated, and the conference includes a half-day of workshops dedicated to helping junior advisory firm staff hone their knowledge and skills.

Surveys

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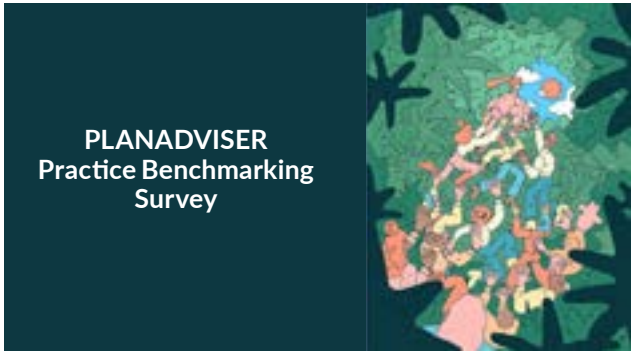
Surveys

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 on the website, but also delves deeper into the findings 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 18)
- Purchasing datasets and reprints of reports
- Commissioning a custom survey (see page 37)



PLANADVISER Brand Surveys

Adviser Value Survey

For the PLANADVISER Adviser Value Survey, defined contribution plan sponsors answer questions about what value working with an adviser adds to their plans and participants. Responses indicate whether the use of an adviser, and, if so, which type—e.g., fiduciary or non-fiduciary—influence the plan's features, services and best practices.

Publish: February

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.

Publish: June 2

Practice Benchmarking Survey

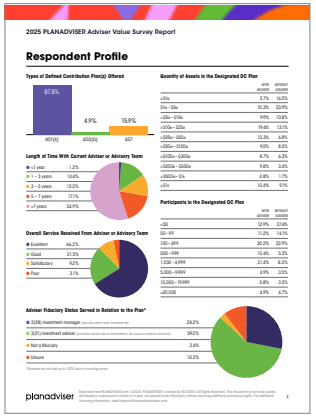
The survey reveals how retirement plan advisers run their practices, particularly with respect to recommending funds, providing individual advice to plan participants and serving as a fiduciary.

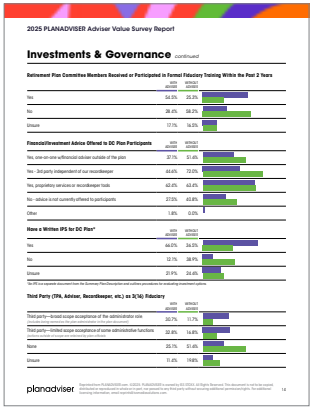
Publish: October 6

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.

Publish: November 2





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. 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

- 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.

Awards

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Annual Awards

PLANADVISER celebrates industry excellence through various award programs and lists. There is no fee to participate in award programs. Honorees are recognized at events and are featured within digital content. Award recipients can purchase logos and other items to showcase their achievement.

Award Programs

All finalists and listmakers, except Emerging Leader and Excellence in Operations listmakers, are recognized at the Industry Leader Awards on May 14 in New York City. Retirement Plan Adviser of the Year winners are announced at the awards ceremony. Emerging Leader listmakers are recognized at PLANADVISER 360 in November.

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 2025
Finalists announced: February
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 assets under advisement 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.

Applications open: January
Listmakers announced: March

Vision Awards

The PLANADVISER Vision Awards celebrate industry leaders and change-makers—one individual and one group—whose work has propelled positive change in retirement saving and security for U.S. workers and retirees.

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 products 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 members of the retirement plan advisory industry whose managers and peers believe are poised to advance the profession in the future.

Nominations open: May
Listmakers announced: August

Excellence in Operations

Our Excellence in Operations award recognizes the retirement plan advisory firm leaders that "make the practices run" and support the advisers who are the faces at the forefront of the industry. The recognition is for more senior non-adviser operations staff. It complements the PLANADVISER awards that honor advisers, to recognize the vital personnel of an advisory practice—whether focusing on operations, data, investment analytics, provider management, or some other piece of the business.

Nominations open: May
Listmakers announced: August

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