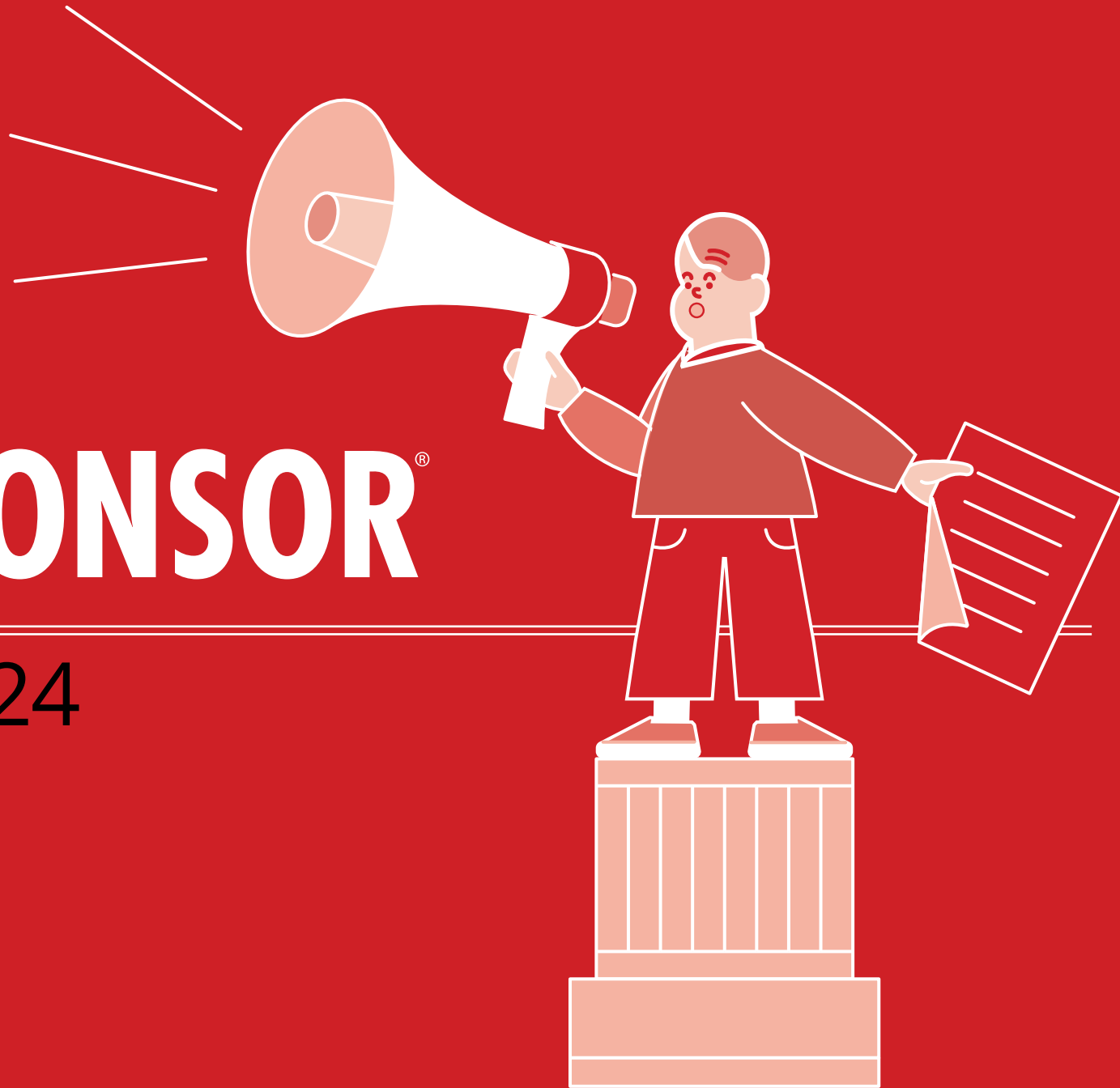


PLANSPONSOR[®]

Media Kit 2024



PLANSPONSOR is the premier educational and informational resource for U.S. retirement benefits programs. We help organizations navigate the complexities of retirement plan design, investment strategy and compliance.

Our mission is to help retirement plan fiduciaries meet their responsibilities and address challenges associated with plan management. We strive to nurture community and recognize excellence and innovation in the retirement plan industry with our awards programs and events.

We educate retirement benefits decisionmakers about plan design and investment trends, optimal administrative and communication practices, and regulatory and legislative requirements through accurate and objective reporting, comprehensive research and educational events featuring leading experts.



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Product Summary

Website



PLANSPONSOR.com features reporting on the latest news, trends, regulations and legislation about employee retirement and financial benefits. Put your brand in front of our audience of finance and human resources professionals and their retirement plan advisers by reserving a spot to highlight your products, services and expertise on our website.

Magazine



With its reputation for editorial integrity, objectivity and leadership, PLANSPONSOR magazine has been the trusted information and solutions resource for America's retirement and financial benefits decisionmakers for 30 years. Increase your firm's recognition as a go-to resource by advertising in or contributing to the in-depth content of the print publication.

Newsletters



Daily, NewsDash reaches plan sponsors of all types, as well as their advisers and providers. Weekly, (b)lines focuses on information and insights for the 403(b) plan community. Bimonthly, Spotlight focuses on a specific theme relevant to plan sponsors. PLANSPONSOR also delivers Breaking News to our readers' inboxes. Each newsletter presents an opportunity to increase familiarity with your brand in the retirement plan industry.

Webinars



Through sponsored and editorial webinars, PLANSPONSOR offers insights and education about plan design, administration and compliance issues facing retirement plan sponsors. Establish your firm as a go-to resource by hosting a discussion or associating your brand with one of our themed webinar events.

Conferences



PLANSPONSOR 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 and services through one of many event partnership opportunities.

Industry Intelligence



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

Surveys



PLANSPONSOR's proprietary surveys have established us as a leading authority in the retirement plan industry, cited by many sources. 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, or pulsing our audience through custom research.

Awards



PLANSPONSOR's various awards programs recognize plan sponsors of excellence, as well as outstanding product and service providers. Participation in our awards programs and awards events highlights the support you provide to your clients as well as the overall plan sponsor community.

PLANSPONSOR®



Audience

Audience / Plan Sponsors

Digital Traffic

- 98,057 users
- 203,118 page views
- 1:46 average session time

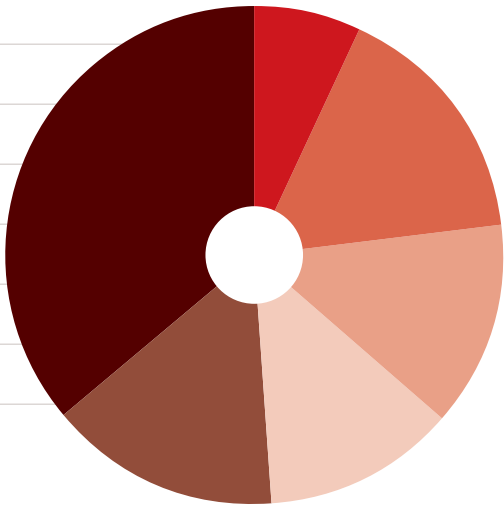
Magazine

- 29,267 subscribers
- 21,526 print subscribers
- 7,741 digital subscribers

Plan sponsors from a wide range of industries rely on PLANSPONSOR.

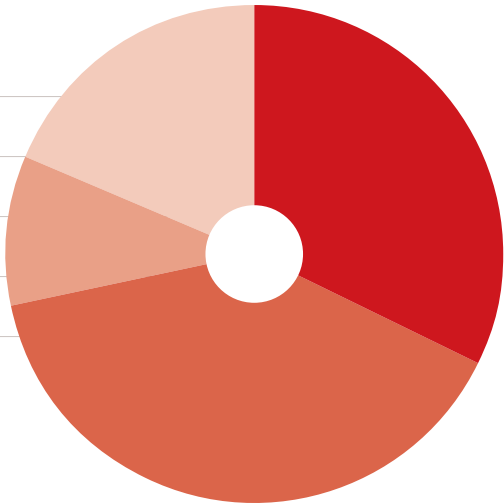
Total Retirement Plan Assets

<\$1MM	7.1%
\$1MM-\$10MM	16.2%
\$10MM-\$50MM	13.3%
\$50MM-\$200MM	12.4%
\$200MM-\$1B	15.1%
>\$1B	35.9%



Number of Employees

<100	32.4%
100-4,999	39.5%
5,000-9,999	9.5%
>10,000	18.6%



Source: Google Analytics 2023 monthly averages; PLANSPONSOR Subscriber Files 4Q23

Audience / Plan Sponsors

Organization Type

Non-Financial Corporation	55.2%	<div></div>
Financial Institution	14.8%	<div></div>
Government (National, State, Local)	9.5%	<div></div>
Non-Profit Institution or Association	9.3%	<div></div>
Professional Service (e.g., CPA, Law Firm)	5.8%	<div></div>
Educational Institution	3.7%	<div></div>
Hospital / Healthcare	1.7%	<div></div>

Role in Organization

Executive/Senior Management	25.8%	<div></div>
Employee Benefits/Payroll	20.7%	<div></div>
Financial Management	11.3%	<div></div>
Personnel/Human Resources	10.8%	<div></div>
Pension Fund/Retirement Manager	8.1%	<div></div>
Operations/Other Management	5.4%	<div></div>
Port Mgr/Inv Officer/Analyst	4.8%	<div></div>
Chief Investment Officer	3.6%	<div></div>
Consultant/Investment Adviser	2.3%	<div></div>
Attorney/Accountant/Auditor	2.1%	<div></div>
Other	5.1%	<div></div>

Plan Types

401(k)	78.3%	<div></div>
Traditional Defined Benefit	39.7%	<div></div>
457	16.8%	<div></div>
403(b)	16.2%	<div></div>
Health Savings Account	15.1%	<div></div>
Other Defined Contribution	5.5%	<div></div>
NQDC*	2.2%	<div></div>
Cash Balance/Hybrid	1.4%	<div></div>

*Nonqualified Deferred Compensation Plan

Investment Types in DC Plan

Target-Date Funds (TDFs)	88.5%	<div></div>
Stable Value	60.6%	<div></div>
Professional Managed Account Svc	43.6%	<div></div>
Money Market	41.9%	<div></div>
Target-Risk Funds/Balanced Funds	22.6%	<div></div>
Fixed-Income	22.6%	<div></div>
Environmental, Social and Governance	12.7%	<div></div>
Employer Stock	11.7%	<div></div>
Alternatives	4.1%	<div></div>
Retirement Inc./Managed Payout Fund	2.0%	<div></div>
In-Plan Annuity	1.9%	<div></div>

Source: PLANSPONSOR Subscriber Files 4Q23

Audience / Plan Advisers

Plan advisers make up an important part of the PLANSPONSOR audience.

Type of Adviser

Financial Advisers	62.4%	<div></div>
<i>RIA-only</i>	30.5%	<div></div>
<i>Dually registered</i>	15.8%	<div></div>
<i>Broker-dealer affiliated</i>	11.2%	<div></div>
<i>Wirehouse-affiliated</i>	4.9%	<div></div>
Other Retirement Services	20.2%	<div></div>
Investment Consultant	17.4%	<div></div>

Plan Types Served

401(k) Plan	85.8%	<div></div>
Defined Benefit	54.2%	<div></div>
403(b) Plan	52.3%	<div></div>
NQDC*	39.4%	<div></div>
457 Plan	38.2%	<div></div>
Cash Balance/Hybrid Plan	37.3%	<div></div>
Health Savings Account	20.9%	<div></div>
529 or Other College Savings Plan	18.1%	<div></div>

*Nonqualified Deferred Compensation Plan

Number of Plans Under Advisement

<10	30.7%	<div></div>
10–50	36.8%	<div></div>
51–100	10.9%	<div></div>
>100	21.6%	<div></div>

Plan Assets Under Advisement

<\$1MM	8.5%	<div></div>
\$1MM–\$10MM	9.5%	<div></div>
\$10MM–\$50MM	10.3%	<div></div>
\$50MM–\$200MM	13.5%	<div></div>
\$200MM–\$1B	18.3%	<div></div>
>\$1B	39.9%	<div></div>

PLANSPONSOR[®]



2024 Calendar

2024 Calendar

January

Online Special Coverage

- Plan Benchmarking 1/2

Featured Surveys

- DC Plan Benchmarking Survey 1/30

Spotlight Newsletters

- DB Plans 1/3
- DC Investing 1/17

Webinar

- SECURE for 403(b) Plans 1/18

February

Online Special Coverage

- Committee Education 2/1

Featured Survey

- Best in Class DC Providers 2/13

Spotlight Newsletters

- DC Plan Design 2/7
- Income in Retirement 2/21

Webinar

- SECURE 2.0: Catching Up With Catch-Ups 2/22

March

Online Special Coverage

- Multiple Employer Plans, Pooled Employer Plans and Pooled Plan Providers 3/1

Spotlight Newsletters

- Participant Retirement Preparedness 3/6
- Benefits, Health Care and HSAs 3/20

Featured Awards

- Plan Sponsor of the Year Finalists
- Best in Class 401(k) Plans
- Service Stars
- DC Standouts

Webinar

- The Evolution of QDIAs 3/14

Conferences and Events

- PLANSPONSOR Roadmap: Financial Wellness Livestream, 3/7

April

Online Special Coverage

- 403(b) Plans 4/1

Conferences and Events

- Health Savings Accounts Conference Livestream, 4/10–4/11

Spotlight Newsletters

- DB Plans 4/3
- DC Investing 4/17

May

Online Special Coverage

- Recruiting, Hiring and Training Plan Sponsors 5/1

Spotlight Newsletters

- DC Plan Design 5/1
- Income in Retirement 5/15

June

Online Special Coverage

- Liability-Driven Investing, Pension Risk Transfer and Plan Termination 6/3

Spotlight Newsletters

- Participant Retirement Preparedness 6/5
- Benefits, Health Care and HSAs 6/19

Featured Surveys and Awards

- Recordkeeping Survey 6/18
- Plan Sponsor of the Year Winners announced 6/6

Conferences and Events

- PLANSPONSOR National Conference and PLANSPONSOR Excellence in Retirement Awards Chicago, 6/4–6/7

January–February *Publish in January*

Highlights

- What's Ahead in 2024
- SECURE 2.0 Act Planning
- Keeping Your Plan Out of Court
- Advice Offerings

Dates

*Sponsored reservation: 11/20/23
Run-of-book reservation: 12/18/23
Material: 12/26/23
Mail date: 1/18/24*

March–April *Publish in March*

Highlights

- DC Survey
- Emergency Savings Vehicles
- Reenvisioning Retirement
- Bridging Retirement Planning and Health Care
- Defined Benefit Plans

Dates

*Sponsored reservation: 1/16
Run-of-book reservation: 2/9
Material: 2/16
Mail date: 3/14*

May–June *Publish in May*

Highlights

- Retirement Plan Sponsors of the Year Finalists
- Evaluating Advisers for Proactivity
- Fiduciary Duties With Regard to Annuities
- Retirement Income

Dates

*Sponsored reservation: 3/15
Run-of-book reservation: 4/12
Material: 4/19
Mail date: 5/21*

As of 2/6/24. This calendar is subject to change.

2024 Calendar

July

Online Special Coverage

- DC Plan Design 7/1

Featured Surveys

- Defined Benefit Administration Survey 7/2

Spotlight Newsletters

- DB Plans 7/3
- DC Investing 7/17

August

Online Special Coverage

- Retirement Income 8/1

Featured Surveys

- NQDC Providers 8/6
- 403(b) Survey 8/13

Spotlight Newsletters

- DC Plan Design 8/7
- Income in Retirement 8/21

September

Online Special Coverage

- Small Plans 9/3

Webinar

- Financial Wellness 9/19

Spotlight Newsletters

- Participant Retirement Preparedness 9/4
- Benefits, Health Care and HSAs 9/18

October

Online Special Coverage

- Cybersecurity 10/1

Spotlight Newsletters

- DB Plans 10/2
- DC Investing 10/16

November

Online Special Coverage

- Personalization in DC Plans 11/1

Featured Surveys

- Participant Survey 1/112

Spotlight Newsletters

- DC Plan Design 11/6
- Income in Retirement 11/20

December

Online Special Coverage

- Employer Contribution Strategies 12/2

Webinar

- Plan Benchmarking 12/12

Spotlight Newsletters

- Participant Retirement Preparedness 12/4
- Benefits, Health Care and HSAs 12/18

July–August *Publish in July*

Highlights

- Retirement Plan Sponsors of the Year Winners
- Reining in Costs
- Gen Z and Younger Investors
- Recordkeeping Survey
- Best in Class Plans
- Service Stars

Dates

Sponsored reservation: 5/19
Run-of-book reservation: 6/13
Material: 6/20
Mail date: 7/25

September–October *Publish in September*

Highlights

- Participant Education and Wellness
- Executive Plans
- Qualified Default Investment Alternatives
- Unique Aspects of 403(b)s
- Defined Benefit Administration Survey

Dates

Sponsored reservation: 7/12
Run-of-book reservation: 8/9
Material: 8/16
Mail date: 9/17

November–December *Publish in November*

Highlights

- Industry innovators
- Best practices for Committee Members
- SECURE 2.0 Implementation
- DC Investment Innovations
- Participant Survey

Dates

Sponsored reservation: 9/13
Run-of-book reservation: 10/11
Material: 10/18
Mail date: 11/19

As of 2/6/24. This calendar is subject to change.

PLANSPONSOR®



Magazine Advertising

Magazine Display Advertising

MAGAZINE ADVERTISING RATES

4-Color Process

Full Page

Spread (Two Pages)

Premium Positions

Cover 2 (Inside front cover)

Cover 3 (Inside back cover)

Cover 4 (Outside back cover)

Opposite TOC, Insights (publisher's letter)

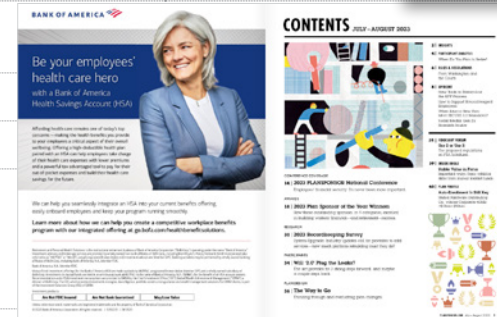
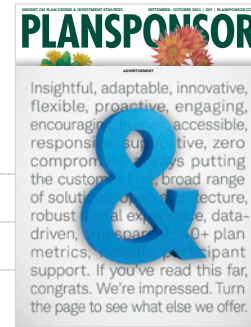
Specialty Covers

Cover 2 Spread (Inside front spread—two pages)

Tip-On/False Cover (two pages)

2024 MAGAZINE CLOSING DATES

Issue	Reservations	Materials
January / February	12/18/23	12/26/23
March / April	2/9/24	2/16/24
May / June	4/12/24	4/19/24
July / August	6/13/24	6/20/24
September / October	8/9/24	8/16/24
November / December	10/11/24	10/18/24



Magazine Display Advertising

Specifications

Advertising Units

Unit	Vertical	Horizontal
2-page spread, live area	—	15.5" x 9.875"
2-page spread, bleed size	—	16.75" x 11.125"
Full page, trim size	8.25" x 10.875"	—
Full page, bleed size	8.5" x 11.125"	—

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.*

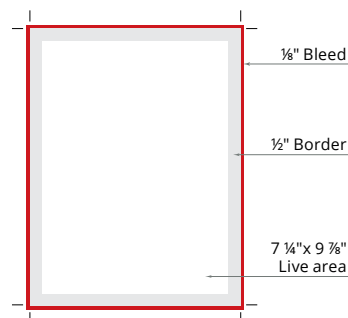
- If you are creating PDF files for magazine ads in InDesign, Illustrator or QuarkXpress 7, you can export PDF files directly from the application. (You should use a "PDF/X" or "High-Quality Press" factory preset.)
- We recommend that users of older versions of Quark create PDF files by writing Postscript 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

PLANSPONSOR / 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 lb. Matte
Text Stock: 45 lb. 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 grayscale 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.*

PLANSPONSOR[®]



Website Advertising

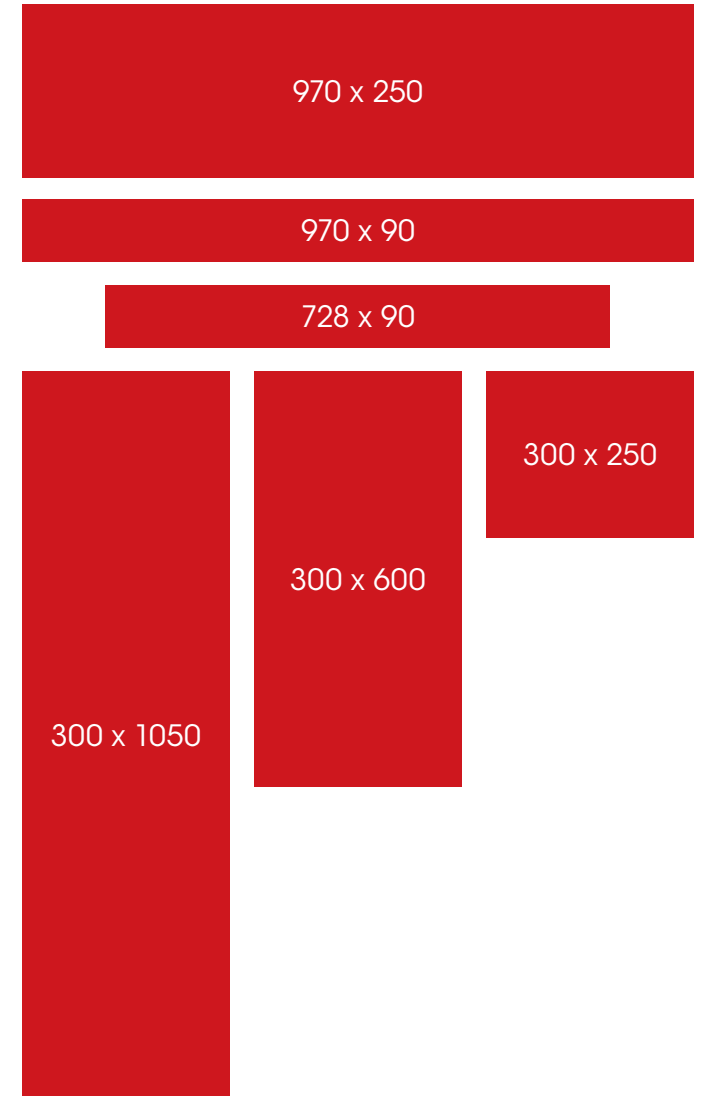
Website Display Advertising

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

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

High-Impact Daily Units	Ad Sizes	Expandable	Expanded Size
Roller 2.0	16:9	No	n/a
Welcome	600x400	No	n/a
Skin	1400x800	No	n/a
Wallpaper	5:1	No	n/a
Pencil Push Down	1040x60	Yes	1040x250
Native In-feed text (top)	Text	No	n/a
Native In-feed text (bottom)	Text	No	n/a

ROS Display Units



Website Display Advertising

Run of Site Advertising

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

Welcome Ad

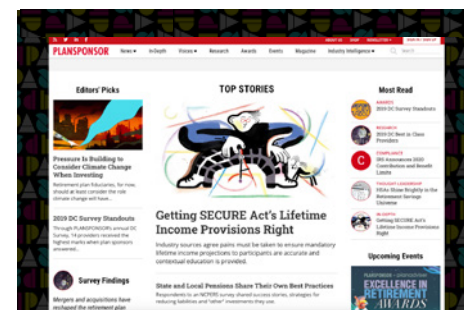
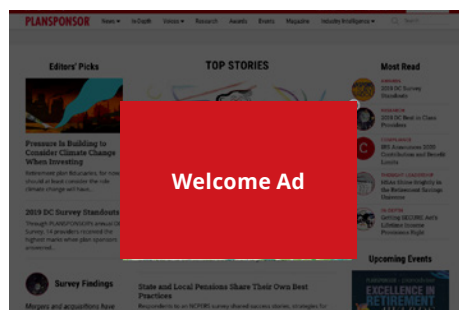
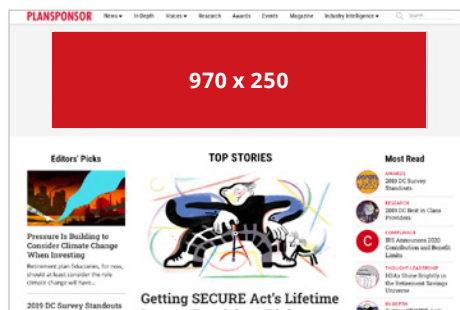
Generate even more visibility for your brand with our Welcome Ad—a dynamic 600x400 unit that commands attention on the first page a visitor comes to on PLANSPONSOR.com. This high-impact ad immerses users, taking over as the primary content and requiring closure for content access. This opportunity has 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 PLANSPONSOR.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 plansponsor.com/advertise.

PLANSPONSOR[®]



Content Sponsorships

Online Special Content Sponsorship (100% SOV)

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

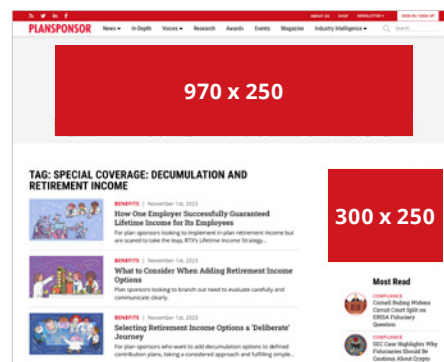
New in 2024: Each Special Content topic kicks off with three pieces, followed by three additional content pieces throughout the month, culminating in a roundup email from the PLANSPONSOR editorial team at the end of the first sponsorship month.

2024 Online Special Content Topics

January	Plan Benchmarking
February	Committee Education
March	Multiple Employer Plans, Pooled Employer Plans and Pooled Plan Providers
April	403(b) Plans
May	Recruiting, Hiring and Training Plan Sponsors
June	Liability-Driven Investing, Pension Risk Transfer and Plan Termination
July	DC Plan Design
August	Retirement Income
September	Small Plans
October	Cybersecurity
November	Personalization in DC Plans
December	Employer Contribution Strategies

Promotional Elements Include:

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



Investment

2-month sponsorship

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.

And, new in 2024, a **Native Text Ad** is included on the content landing page for the first month of each sponsorship.

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, PLANSPONSOR 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 PLANSPONSOR.com. The featured research/survey coverage is promoted on the homepage, in our newsletters and on our LinkedIn page.

2024 Surveys

- **DC Plan Benchmarking Survey** *January 30*
- **Best in Class DC Providers** *February 13*
- **Recordkeeping Survey*** *June 18*
- **Defined Benefit Administration Survey*** *July 2*
- **Participant Survey** *November 12*

** New in 2024 for these surveys only: If the sponsorship is confirmed before March 30, 2024, sponsorship includes the presentation of the research findings to the participants which includes your logo on the cover and a full-page ad in the pdf report.*

Promotional Elements Include:

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

Investment

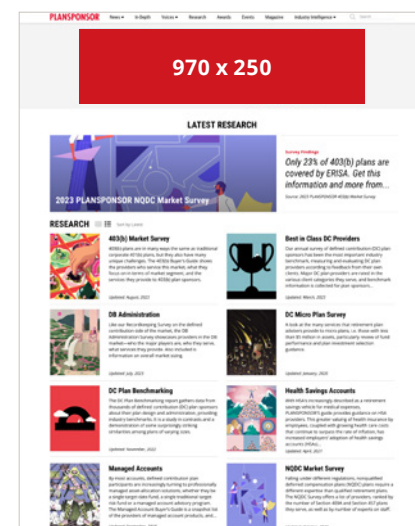
2-month sponsorship

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



PLANSPONSOR[®]



Email Marketing

Editorial Newsletter Advertising

PLANSPONSOR NewsDash

32,412 subscribers (35.4% open rate)

PLANSPONSOR's NewsDash is a daily email newsletter that reaches the leaders of the retirement benefit community. NewsDash delivers updates on news and information that are crucial for the success of plan sponsors and advisers.

PLANSPONSOR (b)lines

6,185 subscribers (38.1% open rate)

PLANSPONSOR's email newsletter (b)lines is designed to help nearly 6,000 advisers and individuals with responsibility for ensuring their organizations' 403(b) plans stay on top of the fast-moving changes and developments in this evolving market. Published on Tuesdays.

PLANSPONSOR Breaking News

39,557 subscribers (49% open rate)

PLANSPONSOR'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.



Editorial Newsletter Advertising

Spotlight Newsletter Sponsorship

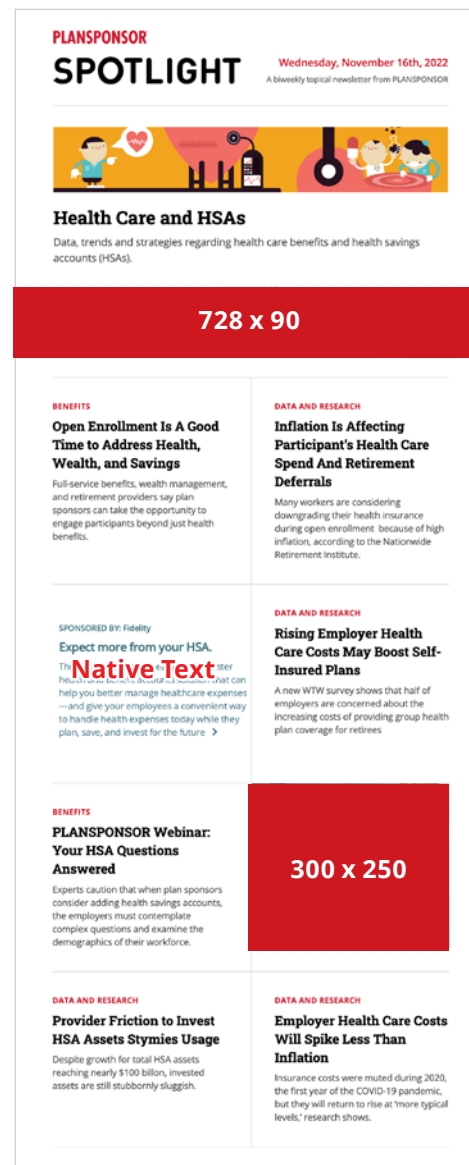
28,207 subscribers (32.4% open rate)

Each year, PLANSPONSOR 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! PLANSPONSOR 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

- **DB Plans** January 3, April 3, July 3, October 2
- **DC Investing** January 17, April 17, July 17, October 16
- **DC Plan Design** February 7, May 1, August 7, November 6
- **Income in Retirement** February 21, May 15, August 21, November 20
- **Participant Retirement Preparedness** March 6, June 5, September 4, December 4
- **Benefits, Health Care and HSAs** March 20, June 19, September 18, December 18



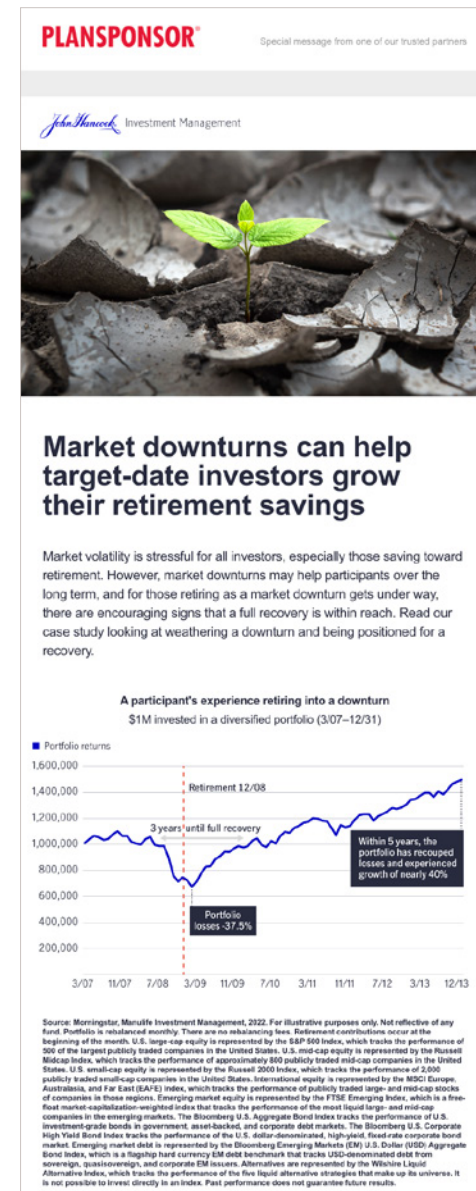
Supplied Newsletter

Supplied HTML Blast*

29,778 subscribers (22.3% 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.*



PLANSPONSOR[®]



Industry Intelligence Programs

Thought Leadership

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

Conducted Thought Leadership

Participate in a focused discussion led by PLANSPONSOR Custom Content Manager and your key executives. We'll craft an article on topic of your choosing, highlighting what distinguishes your firm. PLANSPONSOR will meticulously design the article, and with your final approval, will feature it in PLANSPONSOR magazine and on PLANSPONSOR.com for two months, maximizing your reach.

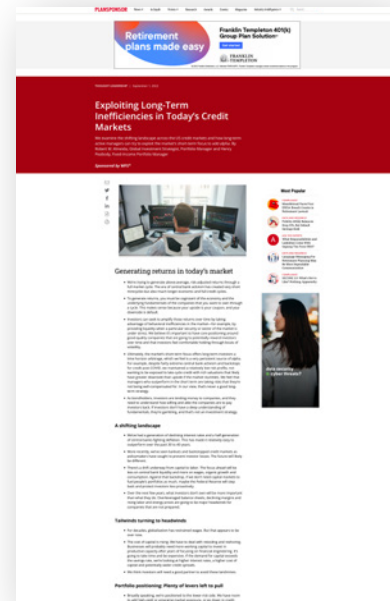
Supplied Thought Leadership

Supply your own thought leadership content to PLANSPONSOR, 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 in PLANSPONSOR magazine and on PLANSPONSOR.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 PLANSPONSOR LinkedIn account (1x/month)
- Regular promotion in newsletters and on PLANSPONSOR.com via native sponsored messages (created by PLANSPONSOR)



White Papers

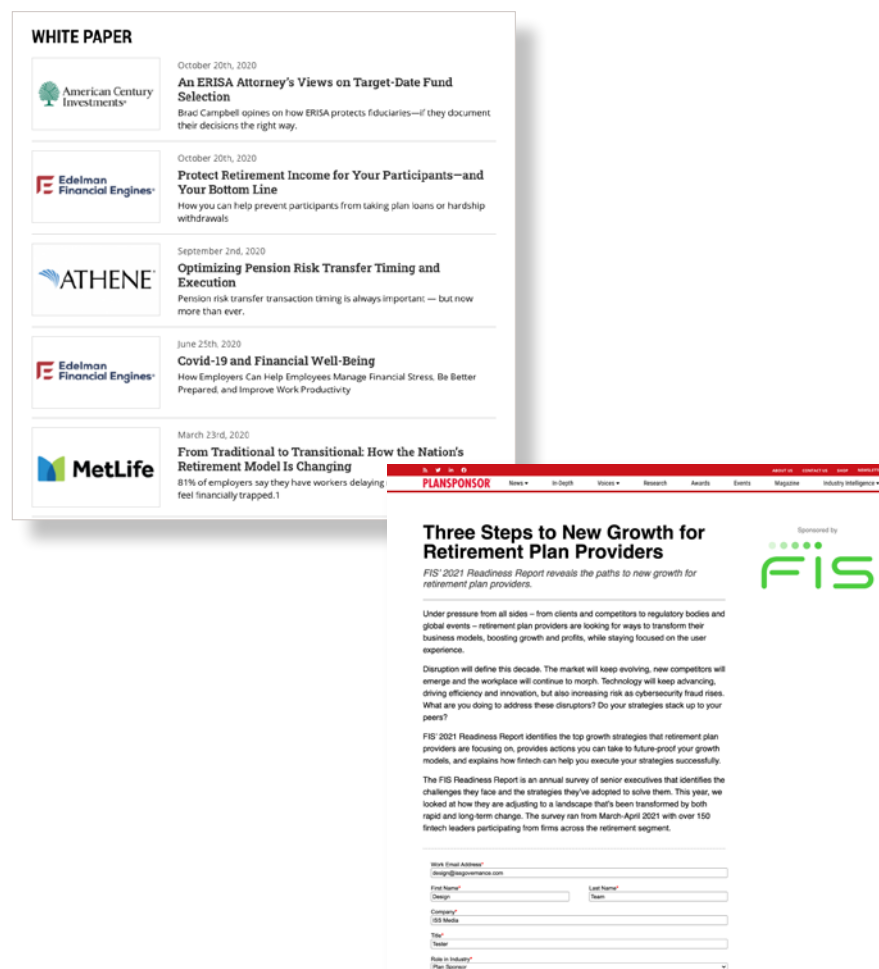
Showcase your white paper on PLANSPONSOR.com to offer comprehensive insights, strategic solutions, and authoritative perspectives that will empower our audience to make informed decisions and optimize the performance of their plans. If desired access to the full content of your white paper can be gated 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 PLANSPONSOR.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 PLANSPONSOR LinkedIn account (1x/month)
- Regular promotion in newsletters and on PLANSPONSOR.com via native sponsored messages (created by PLANSPONSOR)

Note: All topics require publisher approval.



PLANSPONSOR[®]



Webinars

Editorial Webinars

Elevate your brand to new heights with PLANSPONSOR 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

- **SECURE for 403(b) Plans** *January 18*
- **SECURE 2.0: Catching Up With Catch-Ups** *February 22*
- **The Evolution of QDIAs** *March 14*
- **Financial Wellness** *September 19*
- **Plan Benchmarking** *December 12*

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 PLANSPONSOR LinkedIn page

Brought to you by **PLANSPONSOR**

LIVE WEBINAR

Financial Wellness

September 21, 2023

2:00 P.M. ET


Sponsored by

corebridge
financial

PAYFLEX®
A MetLife True Solution


REGISTER HERE

SPEAKER




Jennifer Mausolf
Communications and Retirement Strategies Director,
Municipal Employees' Retirement System of Michigan

SPEAKER




Joshua Ulmer
Managing Director and Institutional Consulting Director,
Graystone Consulting from Morgan Stanley

SPEAKER



Kerry Woods
VP, Participant Education and Engagement,
SageView Advisory Group

MODERATOR



Amy Resnick
Executive Editor, PLANSPONSOR

Financial wellness has been the “buzzword” of the retirement plan industry for at least a decade now. Surveys have shown that many plan sponsors feel a responsibility to make sure their staff are financially well. Employees are hard-pressed to save for retirement when their short-term financial situations are not in order. But what does financial wellness mean?

Join PLANSPONSOR for a discussion about how to define financial wellness for different workforces, the different options available to plan sponsors for offering financial wellness programs to employees and how to get employees to engage in financial wellness offerings.

REGISTER NOW

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 PLANSPONSOR 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 PLANSPONSOR's editorial team to develop a content theme aligning with your goals. PLANSPONSOR 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. PLANSPONSOR introduces and concludes the webinar, while you lead the main discussion. Our team can moderate the Q&A session and run polling if desired.

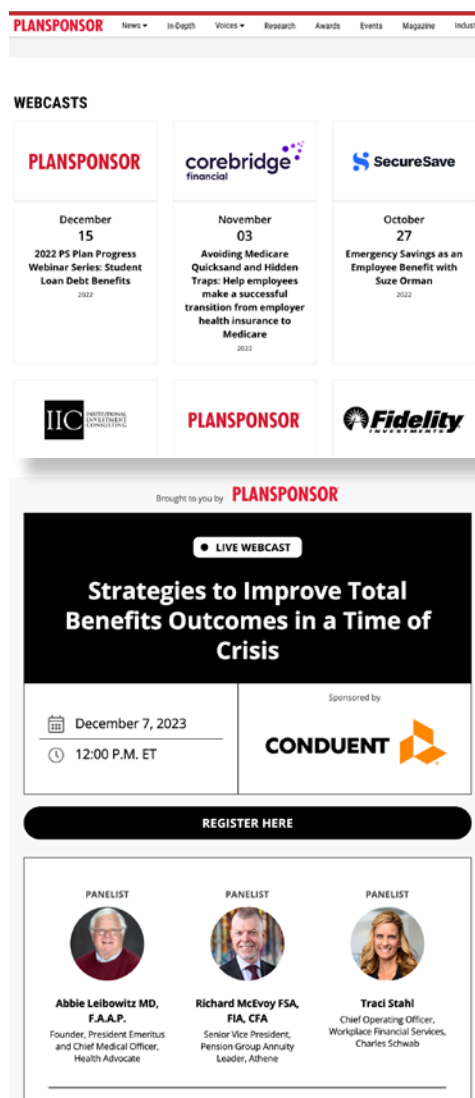
Supplied Webinars

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

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 upcoming webinars
- Promotion on the PLANSPONSOR 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

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



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, PLANADVISER or CIO. Your webcast will be promoted through email, newsletters, and website channels with the same consistency as your campaign via PLANSPONSOR.

Multi-Sponsored “Roundtable” Webinar

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*:

- **Lifetime Retirement Income** *March 26*
- **Fixed Income** *May 21*
- **Target Date Funds at 30** *July 18*
- **Managed Accounts** *October 17*

** Suggested dates and topics, however, PLANSPONSOR will welcome topic suggestions and dates, which require approval by PLANSPONSOR.*

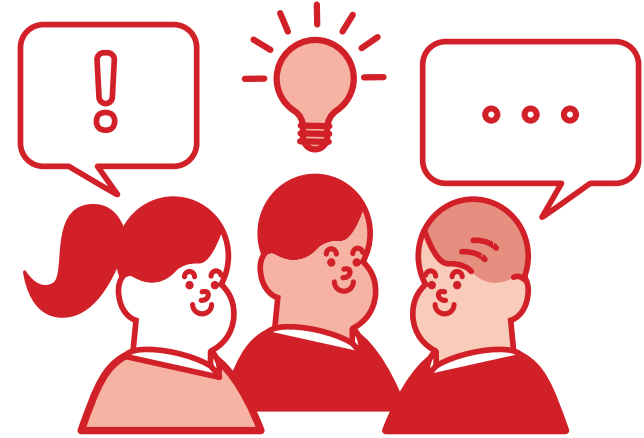
Each Multi-Sponsored Roundtable Webinar includes:

- 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 PLANSPONSOR LinkedIn page
- Ability to include downloadable materials
- Shared list of registrations and attendees
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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 PLANSPONSOR 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.

PLANSPONSOR[®]



Events & Conferences

Ways to Engage with Our Audience

Whether livestreamed or in-person, all events offer opportunities to engage our audience with your brand; present content or have your expert participate in a topical discussion; and drive one-on-one follow up interaction.

Livestreamed events provide education and insights to our audience and strong lead generation to event sponsors. They are full- or half-day events that include sponsored content presentations or case studies as well as sessions on topics curated by PLANSPONSOR in which an expert from a sponsor firm can participate. SOV branding with all ad positions as well as rich media video placement within planned post-event content are also available for sponsorship.

In-person events provide education and insights to our audience and networking and community-building opportunities. Engage with attendees at an on-site exhibit hall or by presenting a case study or research findings. SOV branding with all ad positions as well as rich media video placement within planned post-event content are also available for sponsorship.



Sponsorship Advertising Opportunities

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



Livestreamed Events

PLANSPONSOR Roadmap: Financial Wellness

March 7, 2024

Increasingly, employers are focusing on benefits that can support the overall financial wellness of employees. During this event, plan sponsors will gain insights on defining financial wellness for their workforce, learn how different benefit options can help employees with financial wellness and hear tips for program implementation.

PLANSPONSOR Health Savings Accounts Conference

April 10–11, 2024

The Health Savings Accounts Conference is designed to educate plan sponsors that currently offer, or are considering offering, these accounts. It's also a great opportunity for advisers who want to get up to speed on this fast-growing benefit option. Through the various panel discussions and presentations, employers will see how best to offer this benefit and advisers will learn how to support them in the process. Topics to be discussed include: How HSAs operate; best practices in HSA provider selection and ongoing administration; how to boost employees' knowledge and use of their benefit; and more.

Legislative developments – SECURE 2.0

Increased Required Minimum Distribution (RMD) age	Mandatory cashout increase	Overpayment recovery	Other provisions of note
<ul style="list-style-type: none"> Increased the RMD age from 72 to 73 in 2023 Increased the RMD age from 73 to 75 in 2033 	<ul style="list-style-type: none"> Limit increased to \$7,000 	<ul style="list-style-type: none"> Allows sponsors to decide if they want to recoup overpayments Restrictions on recovery process 	<ul style="list-style-type: none"> Elimination of PBGC Variable Rate Premium deduction Market-based cash balance plan clarity Pension risk transfer reviews/enhanced disclosures

What should sponsors consider?

For sponsors that are...	Next steps
Frozen <ul style="list-style-type: none"> Well-funded With "favorable" demographics With clean (or relatively clean) data 	<ul style="list-style-type: none"> Plan termination may be soon Q3 is the new Q4 Alternative uses for any excessive surplus
Not frozen <ul style="list-style-type: none"> On the way to full funding With "less favorable" demographics With data gaps Not interested in termination 	<ul style="list-style-type: none"> Data review & cleanup Chipping away at liabilities Active 59-1/2 windows Efficient plan management

PLANSPONSOR® ROADMAP

HSA CONFERENCE

In-Person Events

PLANSPONSOR National Conference

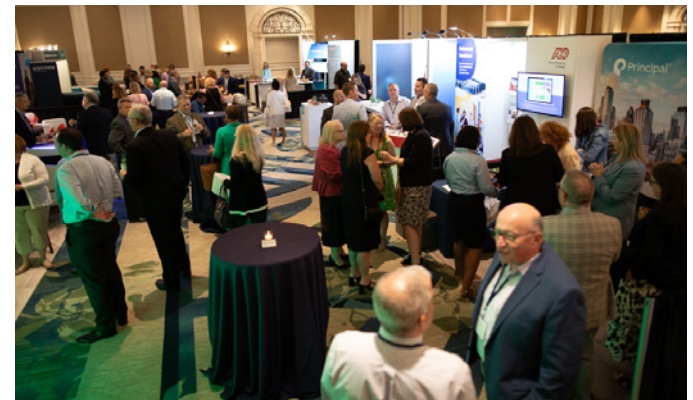
June 4 – 7, 2024 Chicago Marriott Magnificent Mile

The PLANSPONSOR National Conference brings together a unique cross-section of the industry—plan sponsors, retirement plan advisers and providers, industry groups and legislative and legal experts—to provide plan sponsors and advisers with a myriad of takeaways to build plans that improve the outcomes of unique workforces while implementing proper corporate governance to manage fiduciary duties. The conference agenda covers current trends and best practices in plan design, investment solutions and participant engagement and education, as well as legislative and regulatory updates.

The event is designed to build community among plan sponsors of all types and sizes, and it includes the annual Awards for Excellence celebration that recognizes current Plan Sponsor of the Year finalists and winners, as well as other plans and providers who have been awarded accolades from PLANSPONSOR.

PLANSPONSOR NATIONAL CONFERENCE

PLANSPONSOR
EXCELLENCE IN
RETIREMENT
AWARDS



PLANSPONSOR[®]



Surveys

Surveys

Every year, PLANSPONSOR 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 20)
- Purchasing datasets and reprints of reports
- Commissioning a custom survey (see page 42)



PLANSPONSOR Brand Surveys

DC Plan Benchmarking Survey

PLANSPONSOR's annual Defined Contribution (DC) Survey provides important client satisfaction information, as it measures and evaluates 401(k) and other DC providers according to feedback from our own plan sponsor clients. Major defined contribution providers are rated in the various client categories they serve, and benchmark information is collected for plan sponsors to gauge their plans against their peers.

Fielded: July; Published: January

Recordkeeping Survey

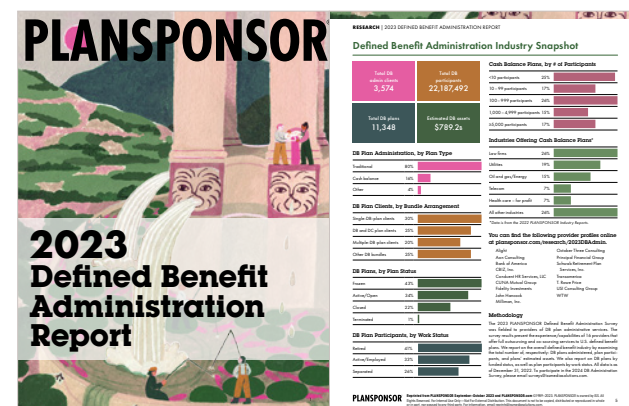
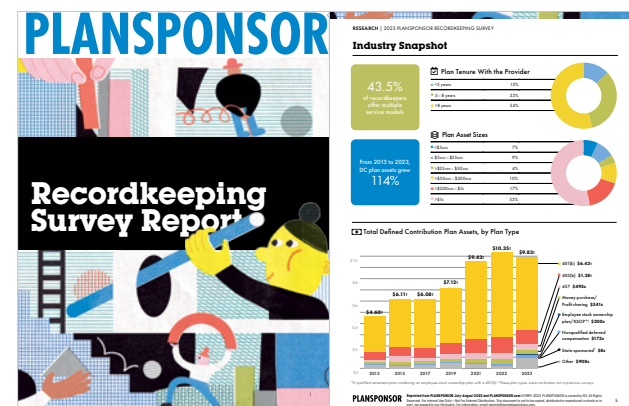
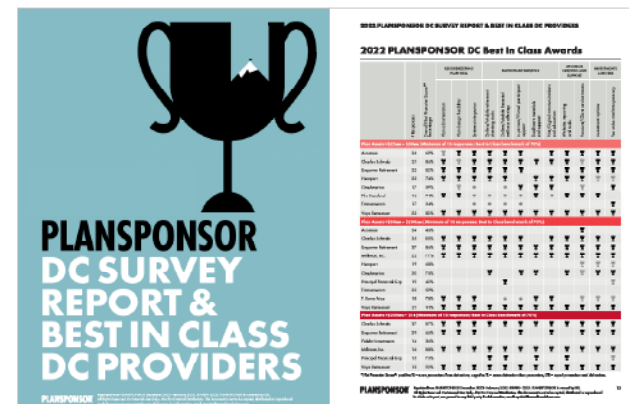
PLANSPONSOR's annual Recordkeeping Survey gives our audience the opportunity to see the products and services each DC provider offers, as well as the provider's total assets and overall client demographics. This survey is comprised of data collected directly from the providers.

Fielded: February; Published: June

Defined Benefit Administration Survey

PLANSPONSOR's Defined Benefit (DB) Administration Survey showcases providers in the DB market—who the major players are, who they serve, what services they provide and overall market sizing.

Fielded: February; Published: July



PLANSPONSOR Brand Surveys

NQDC Providers

Falling under different regulations, nonqualified deferred compensation plans (NQDC) plans require a different expertise than qualified retirement plans. The NQDC Providers Report—a supplement to our annual PLANSPONSOR Recordkeeping Survey—reflects responses from service providers to 457(b), 457(f), 409A and other types of plans that compose the NQDC market.

Fielded: July; Published: August

403(b) Survey

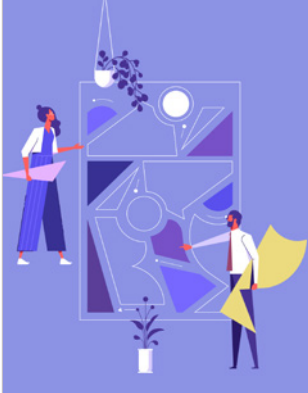
The 403(b) Market Survey is conducted as a supplement to the annual PLANSPONSOR Recordkeeping Survey. Data from recordkeepers that reported having 403(b) plan clients are aggregated by industry, plan type, assets and participants.

Fielded: February; Published: August

Participant Survey

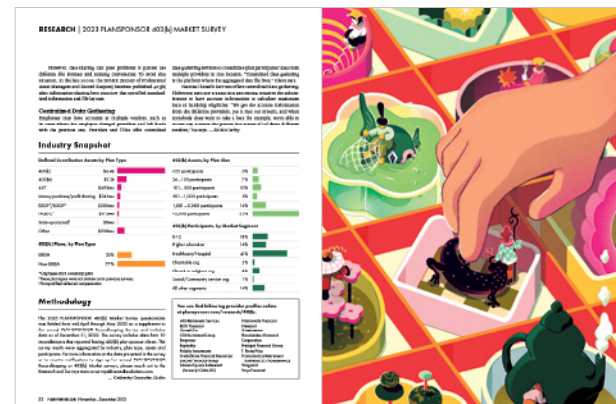
PLANSPONSOR's annual Participant Survey examines the attitudes and behaviors of American workers participating—or not—in employer-sponsored retirement plans. It gathers data about savings rates, employer expectations and confidence levels, among other measures.

Fielded: August; Published: November



2023 PLANSPONSOR DC Best in Class Awards

Category	Plan Type	Assets	Participants	Recordkeepers	Investment Managers	Service Providers	Plan Sponsors
401(k) Plans	Assets	100%	100%	100%	100%	100%	100%
	Participants	100%	100%	100%	100%	100%	100%
	Recordkeepers	100%	100%	100%	100%	100%	100%
	Investment Managers	100%	100%	100%	100%	100%	100%
	Service Providers	100%	100%	100%	100%	100%	100%
	Plan Sponsors	100%	100%	100%	100%	100%	100%
	Assets	100%	100%	100%	100%	100%	100%
	Participants	100%	100%	100%	100%	100%	100%
	Recordkeepers	100%	100%	100%	100%	100%	100%
	Investment Managers	100%	100%	100%	100%	100%	100%
403(b) Plans	Assets	100%	100%	100%	100%	100%	100%
	Participants	100%	100%	100%	100%	100%	100%
	Recordkeepers	100%	100%	100%	100%	100%	100%
	Investment Managers	100%	100%	100%	100%	100%	100%
	Service Providers	100%	100%	100%	100%	100%	100%
	Plan Sponsors	100%	100%	100%	100%	100%	100%
	Assets	100%	100%	100%	100%	100%	100%
	Participants	100%	100%	100%	100%	100%	100%
	Recordkeepers	100%	100%	100%	100%	100%	100%
	Investment Managers	100%	100%	100%	100%	100%	100%



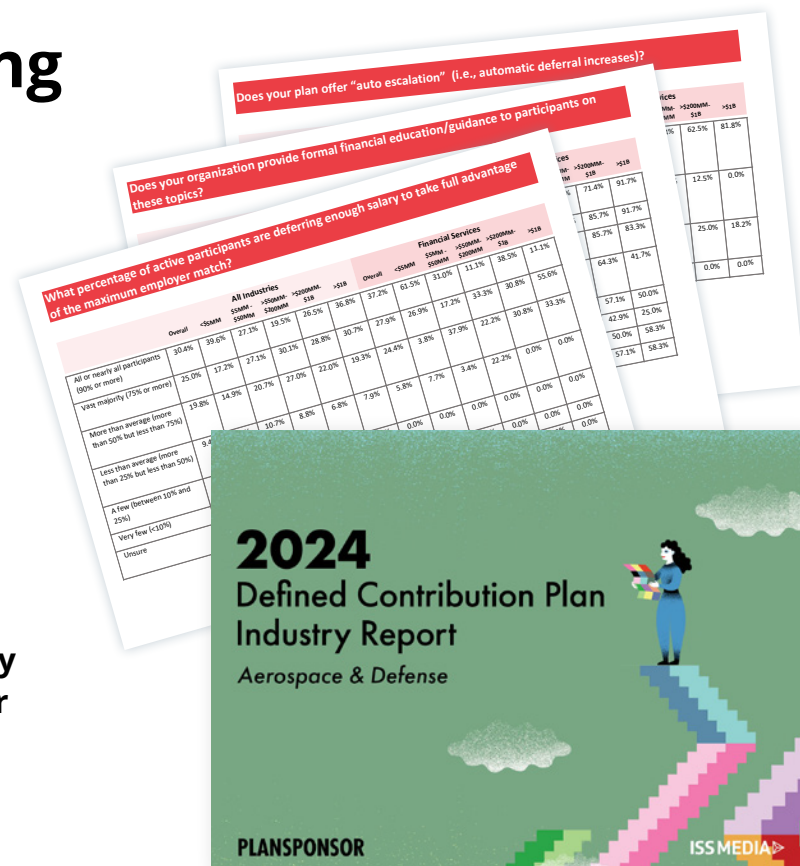
PLANSPONSOR DC Plan Benchmarking Report and Industry Reports

Our annual Plan Benchmarking Report utilizes exclusive data from PLANSPONSOR's annual Defined Contribution (DC) Survey. This report provides a comprehensive overview of DC plan design features and outcomes based on data from thousands of employers. What sets our approach apart is our ability to segment the results into 50+ industry-specific reports, enabling providers and plan sponsors to make detailed comparisons and assessments of their plans.

The PLANSPONSOR DC Plan Benchmarking Data and subsequent Industry Reports provide in-depth coverage of DC plan design and investments for 50+ industries. The 100+ page reports include:

- Comparisons by asset size category
- Plan types and design features
- 'Auto' features
- Participation and eligibility
- Employer match
- Plan investments
- Retirement income
- Fees/expenses
- Defined contribution providers
- Plan oversight and administration

The PLANSPONSOR DC Plan Benchmarking Report and Industry Reports are available starting in late December for orders placed before Thanksgiving. Contact your sales representative for pricing, including discounts for purchasing multiple industry reports.



Custom Survey Capabilities

Unlock exclusive access to the PLANSPONSOR audience. Available on a limited basis, our surveys team will work with you to create a custom survey to the PLANSPONSOR 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.
- PLANSPONSOR 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.

PLANSPONSOR[®]



Award Programs

Annual Awards

PLANSPONSOR celebrates industry excellence through nominations, submissions and surveys. Participation is free. Honorees are recognized at events and are featured within print and digital editorial. Award recipients can purchase logos and accolades to showcase their achievement.

PLANSPONSOR
**EXCELLENCE IN
RETIREMENT
AWARDS**



2024 Award Programs

All winners are announced on the first night of the PLANSPONSOR National Conference, June 4–7 in Chicago.

Plan Sponsor of the Year

The Plan Sponsor of the Year awards honor sponsors dedicated to participants' financial well-being and retirement success across various plan types. All sponsors are eligible.

*Nominations open: December 2023 – January 2024
Finalists announced: March*

Best in Class 401(k) Plans

PLANSPONSOR awards exceptional 401(k) plans and sponsors for best practices. Eligible plans meet specific criteria and are evaluated using a unique scoring system based on factors like enrollment, contributions, investments, advice/education, loans, and governance. Those surpassing the benchmark are named Best in Class. Plans must requalify every five years to maintain this status.

*Finalists announced: March**

** Derived from the PLANSPONSOR Defined Contribution Survey.*

PLANSPONSOR Service Stars

The Service Star Awards honor retirement plan account representatives and relationship managers for outstanding service, as praised by their plan sponsor clients.

*Finalists announced: March**

PLANSPONSOR DC Survey Standouts

This award recognizes top recordkeeping providers based on nationwide satisfaction ratings from sponsors of defined contribution plans in the annual PLANSPONSOR Survey.

*Finalists announced: March**



Contacts

Sales and Marketing

Rob Reif

+1 212-217-6906

robert.reif@issmediasolutions.com

advertise@issmediasolutions.com

Publisher

Alison Cooke Mintzer

+1 646 308 2756

alison.mintzer@issmediasolutions.com

editors@issmediasolutions.com