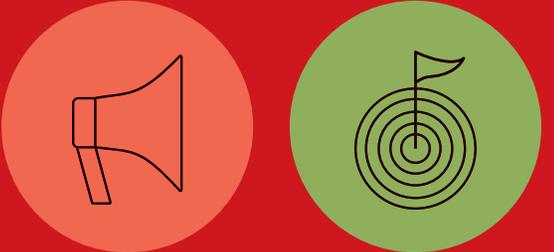




2026 PLANSPONSOR MEDIA KIT



2026 PLANSPONSOR® MEDIA KIT

PLANSPONSOR is the premier educational and informational resource for U.S. retirement benefit 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 award programs and events.

We educate retirement benefit 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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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 benefit decisionmakers for more than 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 and 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 award programs recognize plan sponsors of excellence, as well as outstanding product and service providers. Participation in our award programs and award events highlights the support you provide to your clients as well as the overall plan sponsor community.



AUDIENCE



Audience Profile

Digital Traffic Monthly

-  98,119 users
-  193,462 page views
-  2:03 session duration
-  41.7% engagement rate

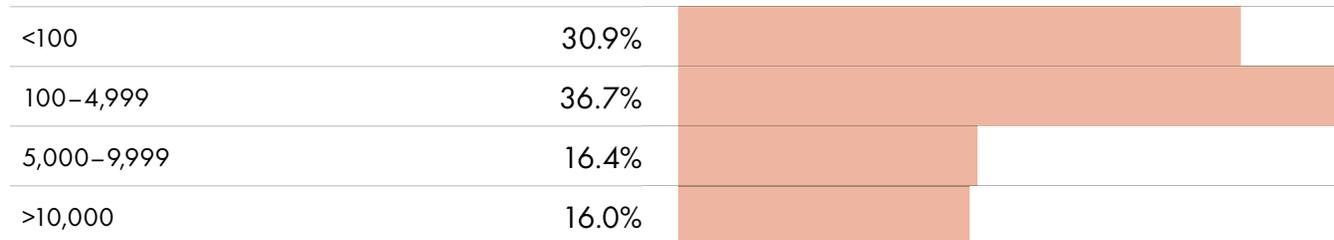
Traffic by Platform Monthly

-  75.1% desktop
-  23.9% mobile
-  1% tablet

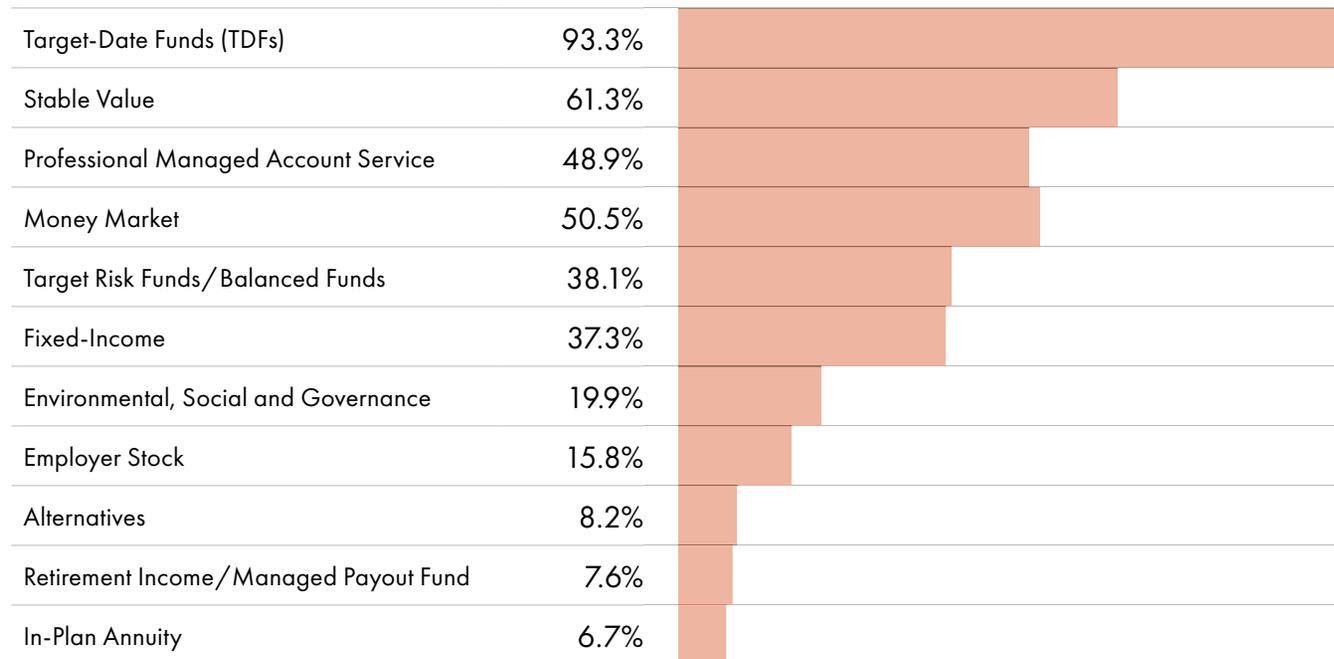
Magazine

-  27,216 total subscribers
- 15,293 print subscribers
- 11,923 digital subscribers

Number of Employees



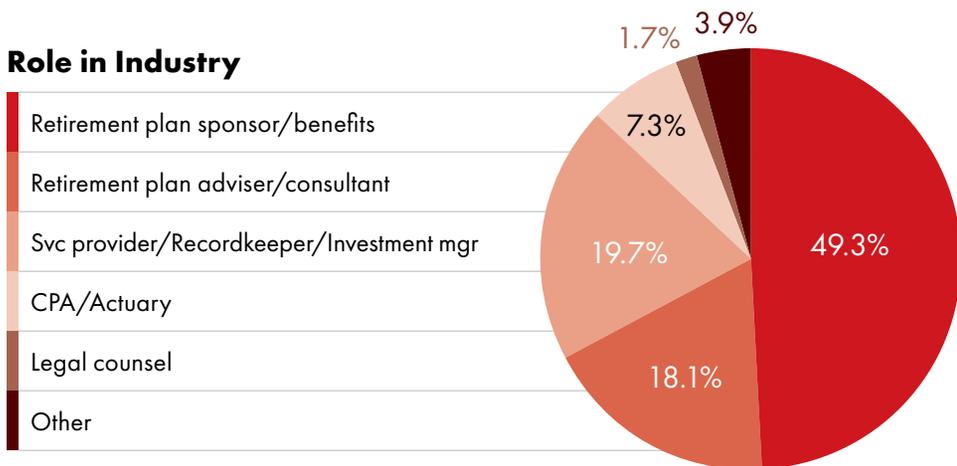
Investment Types in DC Plan



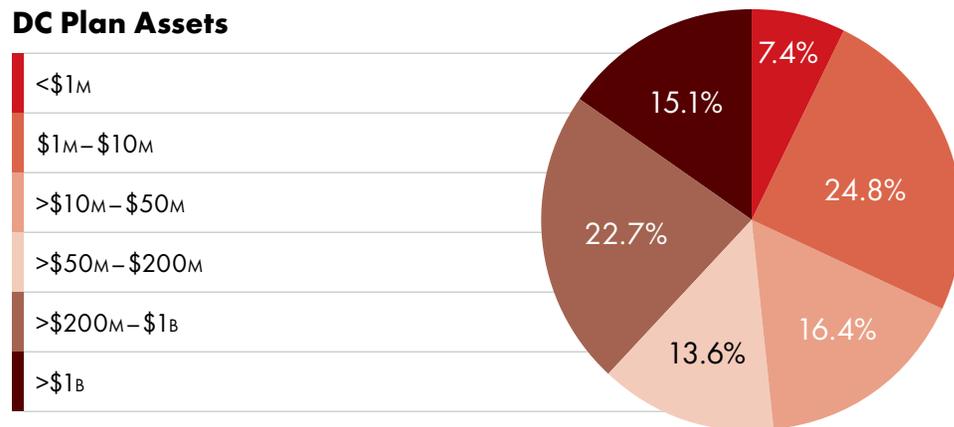
Source: Google Analytics, rolling year through 11/30/25; Subscriber file as of November 2025.

2026 PLANSPONSOR[®] MEDIA KIT

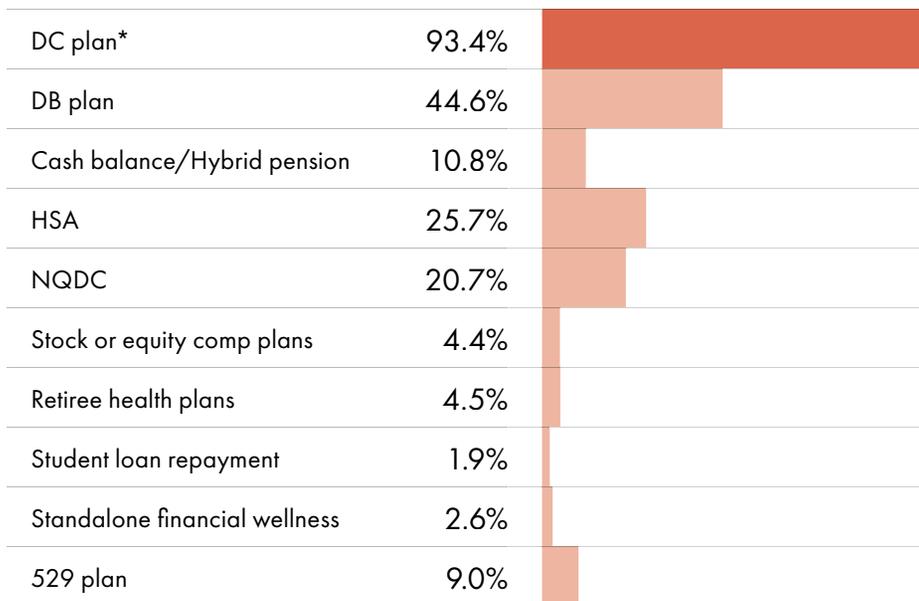
Role in Industry



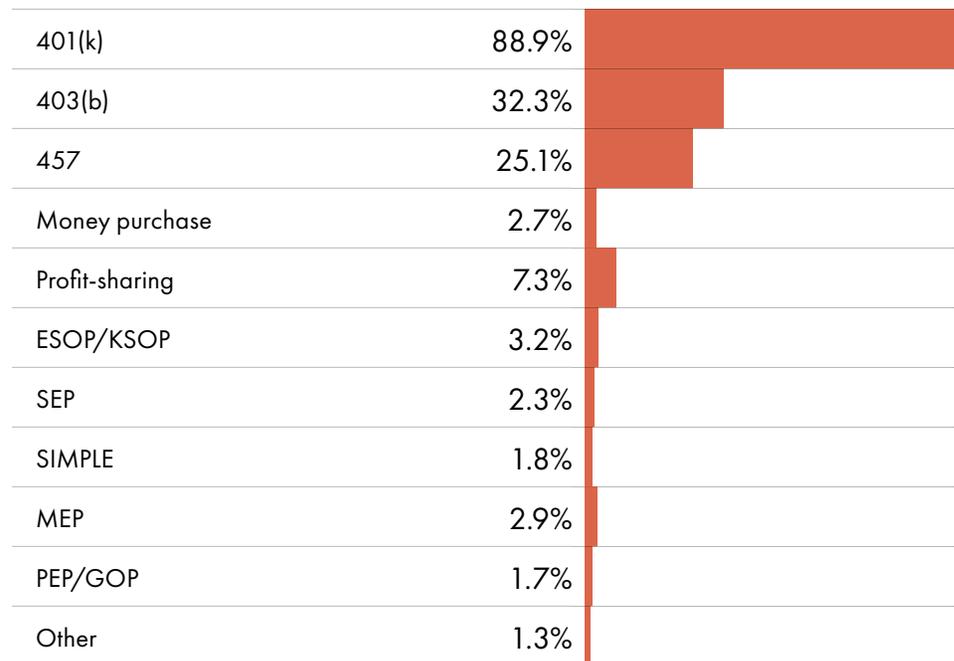
DC Plan Assets



Financial Benefits Offered



DC Retirement Plans Offered



*e.g., 401(k)/403(b)/employee stock ownership plan [ESOP], etc.



CALENDAR



2026 Calendar

January

Special Coverage

- The Legislative and Regulatory Landscape

Spotlight Newsletters

- Financial Literacy and Participant Education
January 7
- DC Plan Investments (TDFs, fees, alts in DC)
January 21

Editorial Webinar

- Benchmarking Your DC Plan
January 28

Featured Survey

- DC Survey: Plan Benchmarking

February

Special Coverage

- Evolution of MEPS, PEPs and Collective DC

Spotlight Newsletters

- Retirement Income and Planning
February 4
- Retirement Plan and Benefits Design
February 18

Featured Survey

- DC Survey: Plan Provider Service Ratings

Livestreams

- PLANSPONSOR Roadmap: Fiduciary 101
February 11, 18, and 25

March

Special Coverage

- Fiduciary Duties

Spotlight Newsletters

- Health Care and HSAs
March 4
- Retirement Plan Data and Research
March 18

Awards

- Plan Sponsor of the Year Finalists
- Best in Class DC Plan Provider Standouts
- Service Stars

April

Special Coverage

- Future of Benefits and the Changing Workforce

Spotlight Newsletters

- Financial Literacy and Participant Education
April 1
- DC Plan Investments (TDFs, fees, alts in DC)
April 15

Livestreams

- PLANSPONSOR Roadmap: Health Benefit Fiduciary Duties
April 8, 15, and 22

May

Special Coverage

- Alts in DC

Spotlight Newsletters

- Retirement Income and Planning
May 6
- Retirement Plan and Benefits Design
May 20

June

Special Coverage

- Plan Communication

Spotlight Newsletters

- Health Care and HSAs
June 3
- Retirement Plan Data and Research
June 17

Featured Surveys

- Recordkeeping Survey;
- 403(b) Market Survey;
- NQDC Market Survey

Awards

- Plan Sponsor of the Year Winners announced

In-Person Events

- PLANSPONSOR National Conference and PLANSPONSOR Excellence in Retirement Awards
Nashville, May 31 – June 3

Q1 Issue *Publish in March*

Highlights

- **DC Survey:**
 - Plan Benchmarking
 - Plan Provider Service Ratings
- **Participant Survey**
- **PLANSPONSOR Roadmap: Retirement Income**

Dates

Sponsored reservation: January 15
Run-of-book reservation: February 12
Material: February 19
Mail date: March 26

Q2 Issue *Publish in May*

Highlights

- **Retirement Plan Sponsor of the Year Finalists**
- **Service Stars**
- **PLANSPONSOR Roadmap: Fiduciary 101**

Dates

Sponsored reservation: March 19
Run-of-book reservation: April 16
Material: April 23
Mail date: May 26

More detailed timing for Surveys on pages 42 – 43 and Awards on page 48. (As of December 10, 2025. This calendar is subject to change.)

2026 Calendar

July

Special Coverage

- Financial Wellness

Spotlight Newsletters

- Financial Literacy and Participant Education

July 1

- DC Plan Investments (TDFs, fees, alts in DC)

July 15

August

Special Coverage

- Decumulation and Retirement Income

Spotlight Newsletters

- Retirement Income and Planning

August 5

- Retirement Plan and Benefits Design

August 19

Featured Survey

- 3(38) Investment Manager Survey

Editorial Webinar

- DB Plan Administration

August 18

September

Special Coverage

- Health Care and HSAs

Spotlight Newsletters

- Health Care and HSAs

September 2

- Retirement Plan Data and Research

September 16

Featured Survey

- Defined Benefit Administration Survey

Livestream

- PLANSPONSOR Roadmap: Plan Investments (QDIA, alts, ETFs, etc.)

September 9, 16, and 23

October

Special Coverage

- DB Plans

Spotlight Newsletters

- Financial Literacy and Participant Education

October 7

- DC Plan Investments (TDFs, fees, alts in DC)

October 21

Livestreams

- PLANSPONSOR Roadmap: Retirement Income

October 14, 21, and 28

November

Special Coverage

- Plan Benchmarking

Spotlight Newsletters

- Retirement Income and Planning

November 4

- Retirement Plan and Benefits Design

November 18

Featured Survey

- Participant Survey

Editorial Webinar

- Understanding Participant Behavior

November 18

December

Special Coverage

- ESOPs and Company Stock in DC Plans

Spotlight Newsletters

- Health Care and HSAs

December 2

- Retirement Plan Data and Research

December 16

Q3 Issue Publish in September

Highlights

- **PLANSPONSOR National Conference coverage**
- **Retirement Plan Sponsor of the Year Winners**
- **Recordkeeping Survey**
- **PLANSPONSOR Roadmap: Retirement Income**

Dates

Sponsored reservation: July 2

Run-of-book reservation: July 30

Material: August 6

Mail date: September 8

Q4 Issue Publish in December

Highlights

- **DB Plan Administration Survey**
- **Outsource Investment Manager Survey**
- **PLANSPONSOR Roadmap: Plan Investments (QDIA, alts, ETFs, etc.)**

Dates

Sponsored reservation: October 8

Run-of-book reservation: November 5

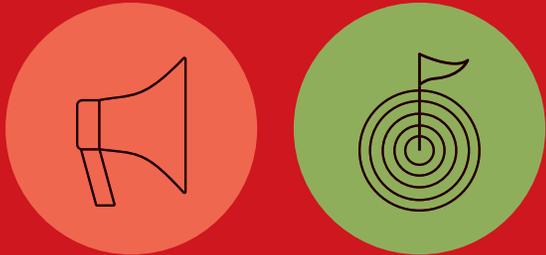
Material: November 12

Mail date: December 17

More detailed timing for Surveys on pages 42 – 43 and Awards on page 48. (As of December 10, 2025. This calendar is subject to change.)



INTEGRATED SOLUTIONS



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



Stay Top of Mind with Plan Sponsors. Build Momentum. Deepen Connection. Maximize Impact.

Plan sponsors are strategic thinkers who value consistency and clarity. A regular presence with PLANSPONSOR ensures your brand becomes a trusted part of their decision-making landscape. By showing up consistently, you reinforce your expertise and build lasting credibility with this influential audience.

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:

- Print Advertising p. 15
- High-Impact Digital Ad Units p. 18, 19
- Content Sponsorship p. 21, 22, 23
- Email Marketing p. 28, 29
- Industry Intel p. 31, 32
- Client-Centric Webinars p. 35



MAGAZINE





Print Advertising



Beginning in 2026, PLANSPONSOR's print magazine will transition to a quarterly schedule. This change reflects the evolving ways people consume content and the preferences of our audience.

Plan sponsors rely on timely updates and meaningful insights, and we're meeting that need with a dual approach: daily news and analysis through our website and newsletters, as well as a quarterly print issue that offers deeper engagement through data-rich features and long-form perspectives on the retirement industry.

This format allows us to deliver valuable information in ways preferred by our audience. It also provides advertisers with greater visibility and staying power, as print issues are kept, revisited and shared over time.

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)

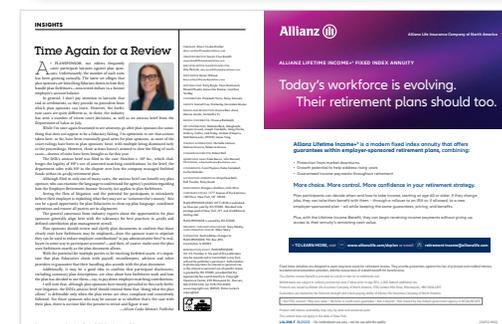
Specialty Covers

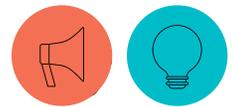
- Cover 2 Spread (Inside front spread—two pages)
- Tip-On/False Cover (two pages)

2026 Magazine Closing Dates

Issue	Reservations	Materials
Q1 March	February 12	February 19
Q2 May	April 16	April 23
Q3 September	July 30	August 6
Q4 December	November 5	November 12

Frequency Discount: Buy 3, get 4th free.





Print 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.

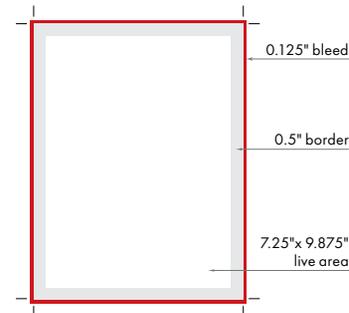
- If you are creating PDF files for magazine ads in InDesign, Illustrator or QuarkXpress 7, you can export PDF files directly from the application. (You should use a "PDF/X" or "High-Quality Press" factory preset.)
- We recommend that users of older versions of Quark create PDF files by writing Postscript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

Standard Unit Size

- Trim size: 8.25" x 10.875"
- Allow 0.125" 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

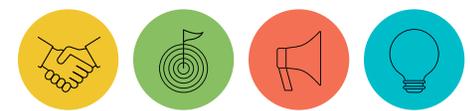
- Correct page size
- 1/8" bleed
- All fonts are active (pay special attention to fonts used in EPS files)
- Both screen and printer fonts are available
- Fonts are not menu-styled
- All images are linked and updated
- Photo effective resolution for black and white line-art images should be more than 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.



WEBSITE





Website Display Advertising

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

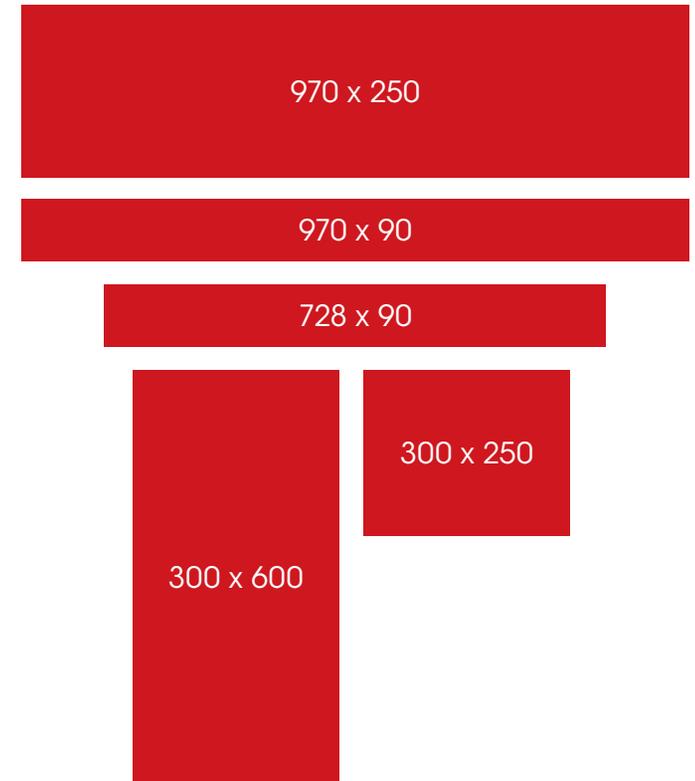
ROS Display Units	Ad Sizes	Expandable	Expanded Size	Flight
Billboard	970x250	No	n/a	Variable
Super Leader	970x90	Yes	970x250	Variable
Leader	728x90	Yes	728x315	Variable
Jumbo Island	300x600	No	n/a	Variable
Island	300x250	Yes	300x600	Variable

High-Impact Daily Units	Ad Sizes	Expandable	Expanded Size
Adaptive Scroller	16:9	No	n/a
Roller 2.0	16:9	No	n/a
Welcome	600x400	No	n/a
Skin	1400x800	No	n/a
Native In-feed text (top)	Text	No	n/a
Native In-feed text (bottom)	Text	No	n/a

Weekly pricing available for daily high-impact units.

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 PLANSPONSOR.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 PLANSPONSOR.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 PLANSPONSOR.com. Positioned at the top of the homepage, this unit has a frequency cap of 1x/day.

Adaptive Scroller Ad

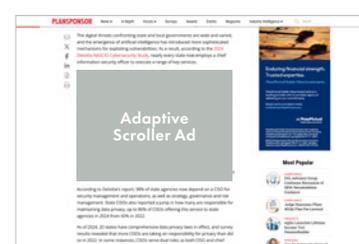
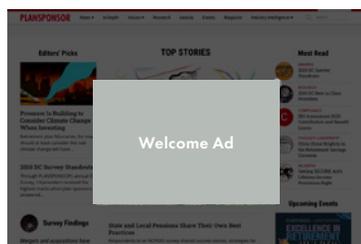
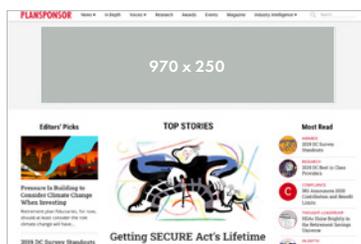


Like the roller ad, the adaptive scroller ad displays on the page as the user scrolls through the content, creating a high-profile viewing opportunity. The difference with this unit is that it's positioned within editorial content—displaying fully before the user continues reading. This placement is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

Interactive Skins



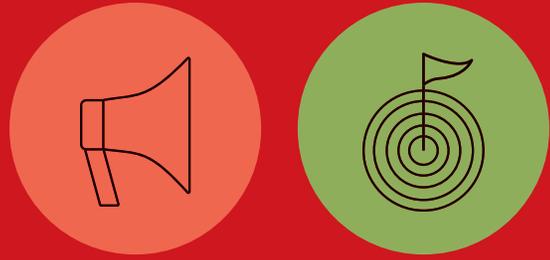
Immerse our audience in your brand message with this high-impact experience by customizing the background graphics on our homepage for desktop users. This dynamic unit isn't just visually appealing—it's clickable, empowering you to direct users to your site and drive engagement.



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



CONTENT SPONSORSHIP





Online Special Coverage Sponsorship (100% SOV)

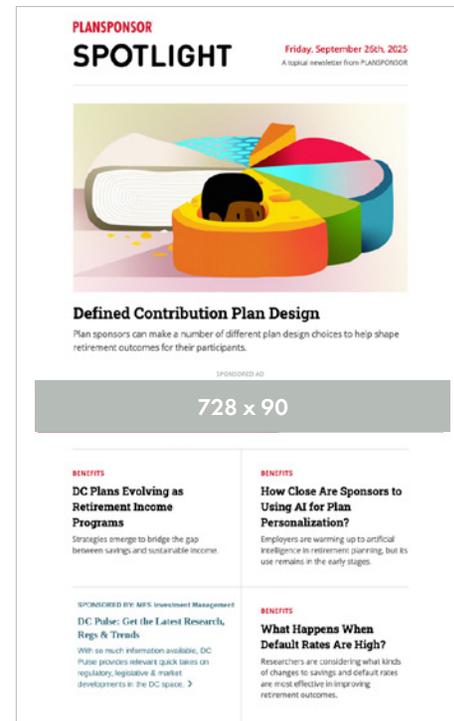
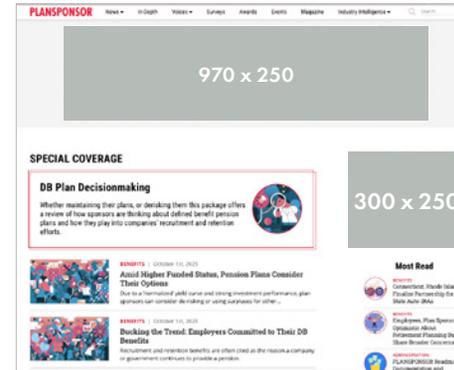


Each month, our editors provide in-depth coverage of a topic for our audience. Each Special Coverage package kicks off at the beginning of the month with three articles, followed by one to three additional pieces of content throughout the month, culminating in a roundup email from the PLANSPONSOR editorial team on the last Friday of the month.

As the exclusive sponsor of this digital editorial content, your brand and message would be featured prominently on the special coverage pages for two months with 100% SOV ad roadblocks and roadblock ad units on special Spotlight newsletter.

2026 Online Special Coverage Topics

January	The Legislative and Regulatory Landscape
February	Evolution of MEPs, PEPs and Collective DC
March	Fiduciary Duties
April	Future of Benefits and the Changing Workforce
May	Alts in DC
June	Plan Communication
July	Financial Wellness
August	Decumulation and Retirement Income
September	Health Care and HSAs
October	DB Plans
November	Plan Benchmarking
December	ESOPs and Company Stock in DC Plans



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 PLANSPONSOR 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



January

The Legislative and Regulatory Landscape

SECURE, OBBBA, executive orders, rescinded guidance, etc.

Spotlight newsletter: January 30

February

Evolution of MEPs, PEPs and Collective DC

How are these plans changing the retirement industry, and what does it mean for plan sponsors, participants and providers?

Spotlight newsletter: February 17

March

Fiduciary Duties

The basics of being an ERISA fiduciary, including prudence and loyalty, selecting providers, voluntary corrections, benchmarking and more.

Spotlight newsletter: March 27

April

Future of Benefits and the Changing Workforce

With a significant gap between available jobs and qualified workers to fill them, employers will reevaluate their benefits' offerings—including NQDCs, matching and vesting formulas—to enable them to recruit and retain staff in an increasingly competitive environment. (state run plans, NQDCs, etc.)

Spotlight newsletter: April 24

May

Alts in DC

What do plan sponsors need to understand about alternative investments and the mechanics of including alts in plans? What are considerations for the kinds of education and communication needed to present them to participants?

Spotlight newsletter: May 29

June

Plan Communication

A review of all that plan sponsors need to do and what they may want to do when communicating with participants about their plans, including required disclosures and participant engagement efforts.

Spotlight newsletter: June 26

July

Financial Wellness

With a focus on what plan sponsors can do to improve participant financial wellness and how that pays off for employers—including emergency savings, student loan debt repayment and more. Examining the convergence of financial health and wellness, addressing the risks of cognitive decline/fraud and NQDCs.

Spotlight newsletter: July 31

August

Decumulation and Retirement Income

What options are available to plan sponsors and to individuals? What does current research say about the understanding of annuities and any additional guidance from the DOL on safe harbors, etc.?

Spotlight newsletter: August 28

September

Health Care and HSAs

The rising cost of health care and the growing aging population, along with possible federal program cuts, all make this topic timely and important for plan sponsors.

Spotlight newsletter: September 25

October

DB Plans

What comes next for DB plans after funding levels rose? Are they being kept open for corporate balance sheet reasons or are they still largely shutting? Are cash-balance plans being adopted by smaller employers as an alternative to DC plans? Plus, how long will states continue to offer DB plans?

Spotlight newsletter: October 30

November

Plan Benchmarking

How plan sponsors need to think about plan design, investments and fees to ensure they are meeting their fiduciary duties and minimizing litigation risk.

Spotlight newsletter: November 20

December

ESOPs and Company Stock In DC Plans

Reviewing the latest regulatory guidance and market trends, while also exploring why the private equity industry is promoting the expansion of ESOPs?

Spotlight newsletter: December 18



Featured Survey Analysis (100% SOV)

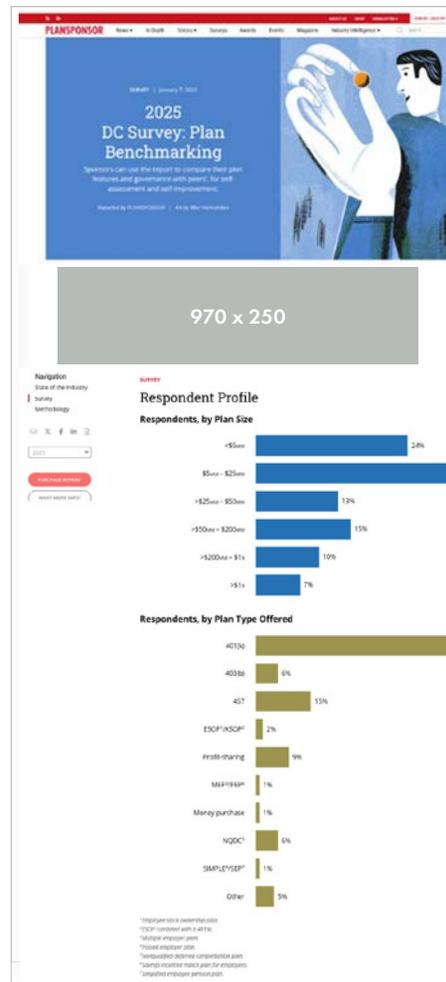


Multiple times a year, PLANSPONSOR showcases the results of our surveys in print and on our website. The featured survey coverage is promoted on the homepage, in our newsletters and on our LinkedIn page.

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 PLANSPONSOR.com.

2026 Surveys

January	DC Survey: Plan Benchmarking
February	DC Survey: Plan Provider Service Ratings
June	Recordkeeping Survey; 403(b) Market Survey; NQDC Market Survey
August	3(38) Investment Manager Survey
September	Defined Benefit Administration Survey
November	Participant Survey



Investment

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

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:

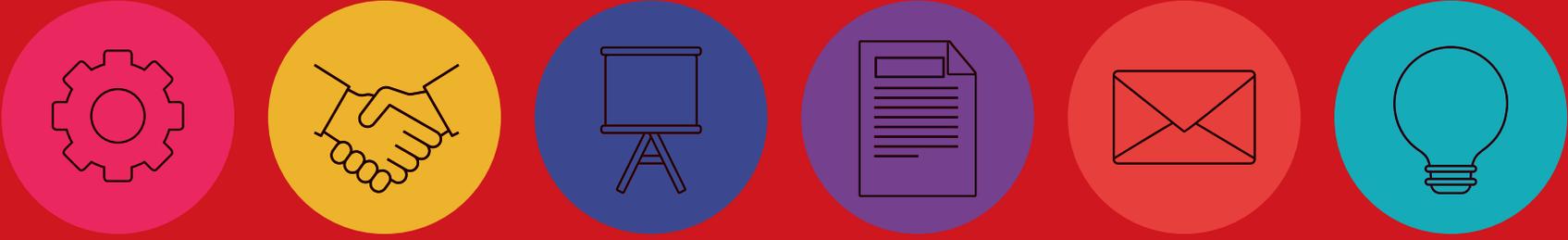
- 728 x 90
- 970 x 90
- 970 x 250
- 320 x 60 (mobile-friendly)

Promotional Elements Include:

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



SOCIAL MEDIA MARKETING





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





Editorial Newsletter Advertising

PLANSponsor NewsDash

44,787 subscribers
+11.2% growth
40.1% 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 Breaking News

44,221 subscribers
+0.6% growth
46.5% 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.

PLANSponsor (b)lines

6,450 subscribers
+1.6% growth
43.6% open rate

PLANSponsor's (b)lines weekly email newsletter is designed to help individuals with responsibility for ensuring 403(b) plans stay on top of the fast-moving changes and developments in this evolving market. Published on Tuesdays.



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



Editorial Newsletter Advertising



Spotlight Newsletter Sponsorship

33,895 subscribers +10.8% growth (45.2% open rate)

Each year, PLANSponsor Editors identify six topics to explore through our Spotlight Newsletter series. The topics rotate on a bi-weekly basis each quarter 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.

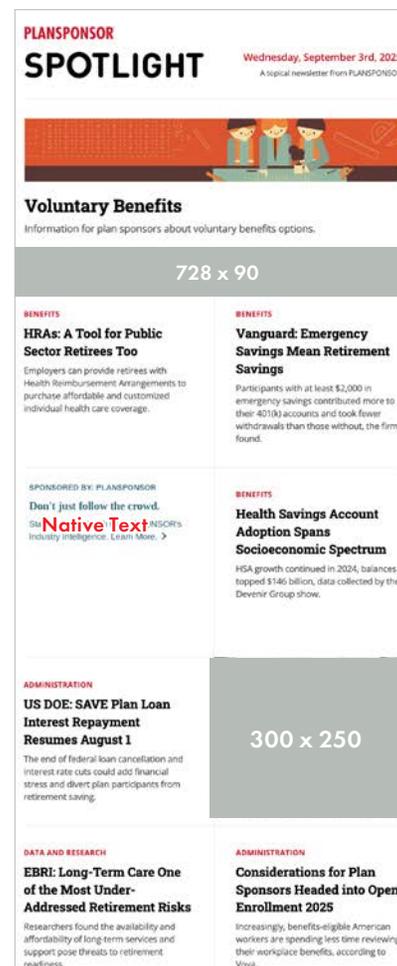
PLANSponsor will welcome topic suggestions from our valued clients resulting in up to four additional Spotlight series. For this opportunity, our Editorial team will work closely with clients to confirm the viability of the topic and the frequency of distribution. Custom Spotlight Newsletters are available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

Spotlight Topics and Dates

- **Financial Literacy and Participant Education**
January 7, April 1, July 1, October 7
- **DC Plan Investments (TDFs, fees, alts in DC)**
January 21, April 15, July 15, October 21
- **Retirement Income and Planning**
February 4, May 6, August 5, November 4
- **Retirement Plan and Benefits Design**
February 18, May 20, August 19, November 18
- **Health Care and HSAs**
March 4, June 3, September 2, December 2
- **Retirement Plan Data and Research**
March 18, June 17, September 16, December 16

Frequency Discount: Buy 3, get 4th free.

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





Supplied Newsletter



Supplied HTML Blast*

21,224 subscribers (44.2% 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. Content cannot be a survey.

Frequency Discount: Buy 3, get 4th free.

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

PLANSPONSOR® Special message from one of our trusted partners

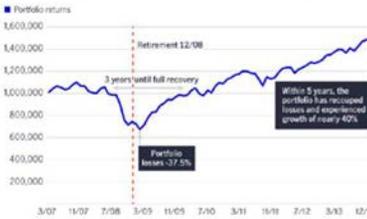
John Hancock Investment Management



Market downturns can help target-date investors grow their retirement savings

Market volatility is stressful for all investors, especially those saving toward retirement. However, market downturns may help participants over the long term, and for those retiring as a market downturn gets under way, there are encouraging signs that a full recovery is within reach. Read our case study looking at weathering a downturn and being positioned for a recovery.

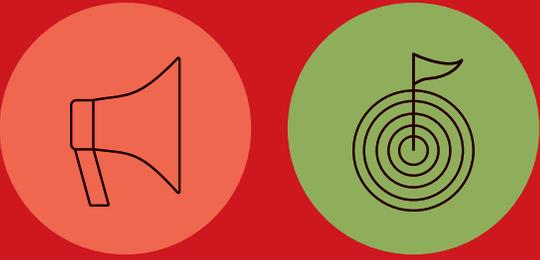
A participant's experience retiring into a downturn
\$1M invested in a diversified portfolio (3/07-12/31)



Source: Morningstar. Morningstar Investment Management, 2022. For illustrative purposes only. Not reflective of any fund. Portfolio is hypothetical. There are no withdrawal fees. Retirement contributions occur at the beginning of the month. U.S. large cap equity is represented by the S&P 500 Index, which tracks the performance of 500 of the largest publicly traded companies in the United States. U.S. mid-cap equity is represented by the Russell Midcap Index, which tracks the performance of approximately 800 publicly traded mid-cap companies in the United States. U.S. small cap equity is represented by the Russell 2000 Index, which tracks the performance of 2,000 publicly traded small-cap companies in the United States. International equity is represented by the MSCI Europe, Australia, and Far East (EMFE) Index, which tracks the performance of publicly traded large- and mid-cap stocks of companies in these regions. Emerging market equity is represented by the FTSE Emerging Index, which is a free float market-capitalization-weighted index that tracks the performance of the most liquid large- and mid-cap companies in the emerging markets. The Bloomberg U.S. Aggregate Bond Index tracks the performance of U.S. investment-grade bonds in government, institutional, and corporate asset classes. The Bloomberg U.S. Corporate High Yield Bond Index tracks the performance of the U.S. dollar-denominated, high-yield, fixed-rate corporate bond market. Emerging market debt is represented by the Bloomberg Emerging Markets (EM) U.S. Dollar (USD) Aggregate Bond Index, which is a regular fixed-income EM debt benchmark that tracks USD-denominated debt from sovereign, quasi-sovereign, and corporate EM issuers. Alternatives are represented by the Wilshire Liquid Alternatives Index, which tracks the performance of the five liquid alternative strategies that make up its returns. It is not possible to invest directly in an index. Past performance does not guarantee future results.



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.

Editorially Conducted Thought Leadership

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

Featured Reprints

Harness the power of PLANSPONSOR 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 PLANSPONSOR, 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 (first Wednesday of every month)
- Promoted on PLANSPONSOR LinkedIn account (1x/month)
- Promoted in newsletters and on PLANSPONSOR.com via native sponsored messages (created by PLANSPONSOR; 1x/month)

Frequency Discount: Buy 3, get 4th free.





White Papers



Generate leads while you 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.

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 (first Wed. of every month)
- Promoted on PLANSPONSOR LinkedIn account (1x/month)
- Promoted in newsletters and on PLANSPONSOR.com via native sponsored messages (created by PLANSPONSOR) (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 publisher approval.

Frequency Discount: Buy 3, get 4th free.

WHITE PAPER



October 20th, 2020

An ERISA Attorney's Views on Target-Date Fund Selection

Brac Campbell opines on how ERISA protects fiduciaries—if they document their decisions the right way.



October 20th, 2020

Protect Retirement Income for Your Participants—and Your Bottom Line

How you can help prevent participants from taking plan loans or hardship withdrawals



September 2nd, 2020

Optimizing Pension Risk Transfer Timing and Execution

Pension risk transfer transaction timing is always important — but now more than ever.



June 25th, 2020

Covid-19 and Financial Well-Being

How Employers Can Help Employees Manage Financial Stress, Be Better Prepared, and Improve Work Productivity



March 23rd, 2020

From Traditional to Transitional: How the Nation's Retirement Model Is Changing

81% of employers say they have workers delaying retirement because they feel financially trapped.1

PLANSPONSOR
Home
Insight
Events
Research
Assets
ES&S
Regulation
Industry Intelligence

Three Steps to New Growth for Retirement Plan Providers

FIS' 2021 Readiness Report reveals the paths to new growth for retirement plan providers.

Under pressure from all sides – from clients and competitors to regulatory bodies and global events – retirement plan providers are looking for ways to transform their business models, boosting growth and profits, while staying focused on the user experience.

Disruption will define this decade. The market will keep evolving, new competitors will emerge and the workplace will continue to morph. Technology will keep advancing, driving efficiency and innovation, but also increasing risk as cybersecurity fraud rises. What are you doing to address these disruptions? Do your strategies stack up to your peers?

FIS' 2021 Readiness Report identifies the top growth strategies that retirement plan providers are focusing on, provides actions you can take to future-proof your growth models, and explains how fintech can help you execute your strategies successfully.

The FIS Readiness Report is an annual survey of senior executives that identifies the challenges they face and the strategies they've adopted to solve them. This year, we looked at how they are adjusting to a landscape that's been transformed by both rapid and long-term change. The survey ran from March-April 2021 with over 150 fintech leaders participating from firms across the retirement segment.



Work Email Address*

First Name* Last Name*

Company*

Title*

Role in Industry*



WEBINARS

PLANSPONSOR

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 thanks 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.

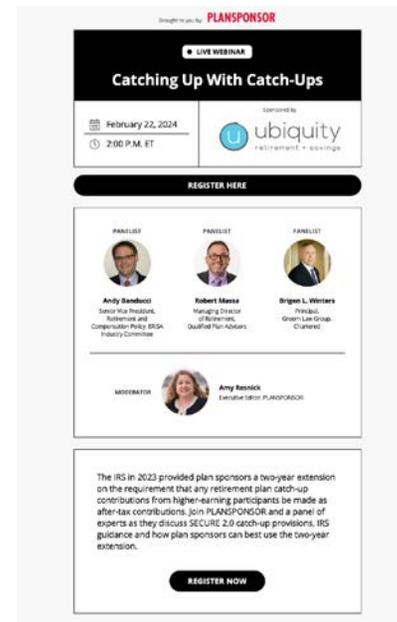
PLANSPONSOR Editorial Webinars Topics and Dates*

- **Benchmarking Your DC Plan (Q1)** *January 28*
Understanding trends in plan design, with insights from the DC Survey
- **DB Plan Administration (Q3)** *August 19*
Thinking through pension plan strategy with insights from the DB Administration Survey.
- **Understanding Participant Behavior (Q4)** *November 18*
What do the data reveal about barriers to participation, featuring insights from the PLANSPONSOR Participant Survey.

*Topics and dates subject to change

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





Client-Centric Webinars



There are four formats to share your company's insight and expertise while showcasing trends, research, new solutions or strategies to the PLANSPONSOR 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

PLANSPONSOR editors will moderate throughout the webinar, showcasing a true partnership.

Sponsored Webinars

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

Multi-Sponsored Webinars

These dynamic live-streamed discussions feature up to three sponsors who delve into a topic of high interest to the PLANSPONSOR audience. Once the topic is finalized, each sponsor can provide one expert to participate in the discussion and PLANSPONSOR 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.

Frequency Discount: Buy 3, get 4th free.

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 PLANSPONSOR 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

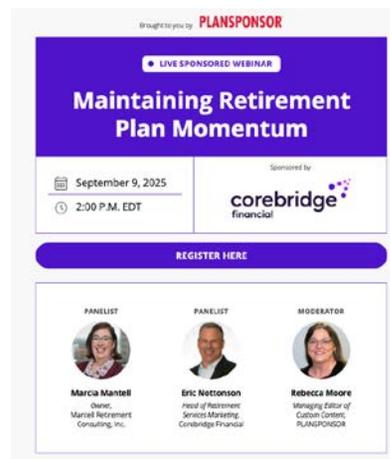
Audience Extension (optional)

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

Extensions

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





EVENTS



Ways to Engage with Our Audience

Livestreamed and in-person 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. Livestreamed events are comprised of a series of webinars—typically, weekly over a one-month period—on topics curated by PLANSPONSOR.

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 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

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



CONFERENCE COVERAGE

2025 PLANSPONSOR National Conference

Where best practices, compliance and networking converge



The 2025 PLANSPONSOR National Conference will be a high-profile, high-visibility event for the industry. It will feature a mix of keynote speakers, panel discussions, and networking opportunities. The event is expected to attract a large number of attendees from across the industry.

State of the Retirement Plan Industry

Experts discuss opportunities for innovation and engagement, as well as some challenges of broader participant retirement inclusion.

Seeking Efficiency

Panel: How retirement advisors of the Defined Contribution Investment Service Association (DICA) can improve their efficiency and productivity.

and an array of live and on-demand content. The event will be a high-profile, high-visibility event for the industry. It will feature a mix of keynote speakers, panel discussions, and networking opportunities. The event is expected to attract a large number of attendees from across the industry.

Looking Beyond Asset Growth

The event will feature a mix of keynote speakers, panel discussions, and networking opportunities. The event is expected to attract a large number of attendees from across the industry.

Panel: How retirement advisors of the Defined Contribution Investment Service Association (DICA) can improve their efficiency and productivity.





PLANSPONSOR Roadmap LIVESTREAMED EVENTS

The PLANSPONSOR Roadmap events are livestreamed webinar series that focus on a topic of interest to plan sponsors and their advisers. Each is intended to equip plan sponsors with the insights needed to develop or update processes and programs. Attendees expect to come away with resources and checklists to guide them, offering the opportunity for event sponsors to showcase their expertise and offerings by providing handouts and participating in the discussions.

PLANSPONSOR Roadmap Topics and Dates

- Fiduciary 101** *February 11, 18, and 25*
Basic education about Employee Retirement Income Security Act fiduciary duties and processes to remain compliant.
- Health Benefit Fiduciary Duties** *April 8, 15, and 22*
Covering legislative, regulatory and enforcement updates on the new requirements for sponsors of employee health benefits.
- Plan Investments** *September 9, 16, and 23*
What plan fiduciaries need to know about investment options for DC plans, including QDIAs, alternative investments, and more.
- Retirement Income** *October 14, 21, and 28*
Exploring retirement expense needs and the options for creating income in retirement.

PLANSPONSOR ROADMAP®

PLANSPONSOR ROADMAP
Retirement Income

Livestream | October 8, 15, 22 and 29

[REGISTER NOW](#)

[ABOUT](#) [AGENDA](#) [SPEAKERS](#) [SPONSORS](#)

About

2025 PLANSPONSOR Roadmap Livestream Series: Retirement Income

This livestreamed event will explore the use of retirement income products and their availability for defined contribution plans. Experts will share statistics on what plan sponsors offer and what participants take up; discuss strategies for adopting different products as tools to optimize retirement outcomes; and examine the marketplace for guaranteed income options, notably annuities. Topics will also include Social Security claiming strategies and Medicare.

Agenda

Overview [October 8](#) [October 15](#) [October 22](#) [October 29](#) [Print Agenda](#)

PLANSPONSOR Roadmap: Retirement Income Livestream Series

October 8 2:00 - 3:00 p.m. ET	"Want" vs. "Use" Surveys indicate that defined contribution retirement plan participants want products and investments that will help them create retirement income, especially guaranteed income, but so far, DC plan sponsor and participants uptake has been low. Hear the latest stats on retirement income product adoption and use and what features or communications could drive increases in adoption and use. Register Here
October 15 2:00 - 3:00 p.m. ET	All About Annuities Experts will explore the evolution of annuities and the features of different types of annuities in the marketplace. They will explain guaranteed minimum income benefit and guaranteed minimum withdrawal benefit contracts and other options that either limit losses or provide options for continued investment growth. Register Here
October 22 2:00 - 3:00 p.m. ET	Incorporating Annuities in DC Plans Learn about the fiduciary standards for selecting an annuity product and how to determine whether and which type of product is right for your plan's participants. Speakers will discuss strategies for incorporating annuities into DC plans and how to communicate about annuities to participants in terms they can understand. Register Here
October 29 2:00 - 3:00 p.m. ET	Social Security and Medicare An expert will share what plan sponsors and participants need to know about Social Security and Medicare and the role they play in retirement income planning. She will also discuss options for communicating with and educating participants and how best to engage them. Register Here



PLANSPONSOR National Conference IN-PERSON EVENTS

May 31 – June 3, 2026 / Nashville, Tennessee

The PLANSPONSOR National Conference is the must-attend conference tailored for HR and finance professionals responsible for administering employer-sponsored retirement plans. The event is where industry luminaries, award-winning professionals, legal experts and other authorities convene to deliver insightful discussions and engaging presentations.

The conference agenda includes panels and presentations about a wide spectrum of crucial topics, and attendees will have ample opportunities to connect with peers, foster valuable networks and explore the latest product and service innovations from providers. On the first night of the conference, during the annual Awards for Excellence celebration, PLANSPONSOR recognizes current Plan Sponsor of the Year finalists, winners, and providers named DC Survey Standouts and provider staff chosen as Service Stars.

PLANSPONSOR NATIONAL CONFERENCE

PLANSPONSOR EXCELLENCE IN RETIREMENT *AWARDS*





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. We showcase key highlights within the magazine, delve deeper into the findings on our website and offer 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 22)
- Purchasing datasets and reprints of reports
- Commissioning a custom survey (see page 45)





PLANSPONSOR Brand Surveys

Defined Contribution 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 various service categories, and plan design and investment benchmark information is collected for plan sponsors to gauge their plans against their peers.

DC Survey: Plan Benchmarking — January 13

DC Survey: Plan Provider Service Ratings — February

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.

June 9

403(b) Market Survey

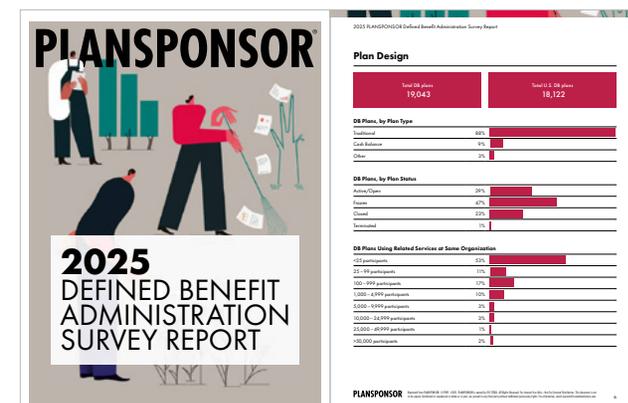
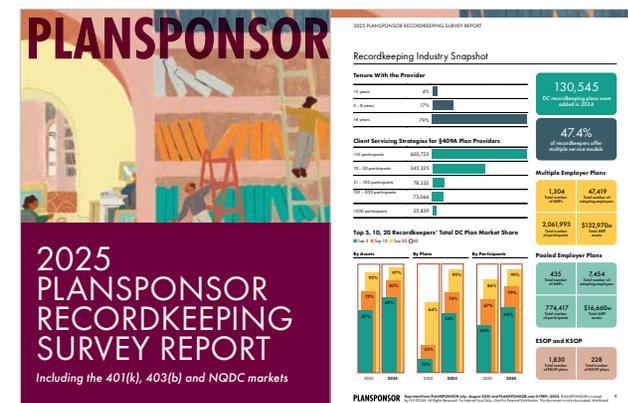
The 403(b) Market Survey is conducted as a supplement to the annual PLANSPONSOR Recordkeeping Survey. Data from recordkeepers that reported having 403(b) plan clients are aggregated by industry, plan type, assets and participants.

June 16

NQDC Market Survey

Falling under different regulations, nonqualified deferred compensation (NQDC) plans require a different expertise than qualified retirement plans. The NQDC Market Survey 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 comprise the NQDC market.

June 23



DC Survey: Plan Benchmarking Report & 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 Survey Plan Benchmarking Data and subsequent Industry Reports provide in-depth coverage of DC plan design and investments across numerous plan types and 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 Defined Contribution 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. 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.

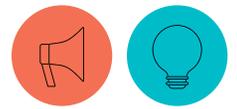
Additional Details:

- 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.



AWARD PROGRAMS



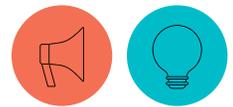


Annual Awards

PLANSPONSOR celebrates industry excellence through awards originating from nominations, applications and surveys. There is no fee to participate in award programs. Honorees are recognized at events and featured within print and digital content. Award recipients may purchase logos and other items to showcase their achievement.

PLANSPONSOR EXCELLENCE IN RETIREMENT *AWARDS*





Award Programs

Award recipients are recognized, and Plan Sponsor of the Year winners are announced at the Excellence in Retirement Awards celebration the first night of PLANSPONSOR National Conference, May 31– June 3, 2026.

PLANSPONSOR 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: October 2025
Finalists announced: March*

PLANSPONSOR Best in Class DC Plan Provider Standouts

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

*Recipients announced: March**

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 who respond to the PLANSPONSOR DC Survey.

*Recipients announced: March**

**Derived from the PLANSPONSOR Defined Contribution Survey.*



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