chief investment officer

MEDIA KIT 2018
2018 CIO Mission Statement

Chief Investment Officer’s sole focus is to deliver insight to institutional chief investment officers and other key investment decision makers at the world’s largest public and corporate pensions, sovereign wealth funds, endowments and foundations, insurance funds, health care organizations, family offices, and defined contribution plans. Our engaged audience has a combined $10.8 trillion of assets under management and counts on us for timely, actionable insights about how to maximize returns, minimize risks, and innovate.

CIO is the only the only brand to focus solely on the needs of institutional chief investment officers and enjoys unrivaled engagement with this audience. We interact with our audience through global events, daily online news, electronic newsletters, videos, webcasts and various social platforms. Whatever the platform, our content focuses on the five vital components of a chief investment officer’s job. These include:

- Asset Allocation
- Portfolio Construction
- Manager Selection
- Risk Management
- Governance

Daily News and Insights
Throughout the year, we deliver critical news and insights in these key areas. Some of the features you will see on our website include:

- **Power 100 Profiles** Profiling the innovation these best in class CIOs are delivering to their fund(s).
- **Newsmakers** Insight into the minds of today’s top portfolio managers, analysts and investment specialists.
- **Emerging Market of the Month** Deep dive analysis of an emerging market in the news, with ongoing interactive strategy discussion.
- **Innovation Layer** Tracking the investment outlook for tech innovation across multiple sectors.

Monthly Sector Spotlight
Each month CIO will drill down into different investment and risk management strategies.

January
- Annual investment outlook on all asset classes

February
- OCIO Survey & Buyers Guide

March
- Hedge Funds

April
- Multi-Asset Strategies
- CIO Summit

May
- Private Equity
- 2018 Forty Under Forty

June
- Fixed Income

July
- Quantitative Strategies
- 2018 Knowledge Brokers

August
- ESG

September
- Transition Management Survey & Buyers Guide

October
- Real Assets
- 2018 Power 100 List

November
- LDI Survey & Buyers Guide

December
- Annual Industry Innovation Awards

Audience Engagement
Along with in-depth reporting, the Digital FIRST strategy leverages interactivity to generate unparalleled audience engagement through:

- **Discussion Forums** Rich, candid discussions that drill down into the most salient points about each monthly issue inspired by reporting, data, and insight.
- **Live Polling Questions** Asset owners respond to focused hot button issues in each monthly category.
- **Monthly Research** Asset owners get submit anonymized individual data to receive aggregates in each category for unique insights into how the industry/their peers are allocating.
**Audience**

### AI-CIO.COM WEBSITE

- **42,000** Unique visitors
- **145,000** Page views
- **2 minutes 25 seconds** Average time per visit

### CIOALERT ENEWSLETTER

- **24,250** Circulation base
- **Daily** Frequency
- **22%** Average open rate

### SOCIAL FOOTPRINT

- Twitter
- Facebook
- Linkedin

### ORGANIZATION TYPE*

- Government (National, State, Local) **41%**
- Non-Financial Corporation **14%**
- Non-Profit Institution or Association **10%**
- Insurance **9%**
- Endowment **7%**
- Foundation **5%**
- Educational Institution **4%**
- SWF / World Bank / IMF **2%**
- Union **1%**

### TOTAL ASSETS OF ORGANIZATIONS*

- >$100b USD **13%**
- $75b – $100b USD **4%**
- $50b – $75b USD **4%**
- $25b – $50b USD **9%**
- $1b – $25b USD **44%**
- $750MM – $1b USD **5%**
- $500MM – $750MM USD **2%**
- $250m – $500MM USD **4%**
- $50MM – $250MM USD **10%**
- <$50MM USD **5%**

### ROLE IN ORGANIZATION*

- Chief Investment Officer **22%**
- Investment Officer / Portfolio Manager / Director / Manager / Strategist / Analyst **41%**
- CFO / Treasurer / Assistant Treasurer / Finance Officer / Controller / Other Financial Titles **11%**
- President /CEO / COO / Chairman / Vice Chairman / Trustee / Investment Board Member **7%**
- Investment Consultant / Investment Adviser **14%**
- Attorney / Accountant / Auditor **2%**
- Other **3%**

### TYPE OF PLAN(S) ORGANIZATION OFFERS*

- Defined Benefit **57%**
- Defined Contribution **50%**
- Endowment **29%**
- Foundation **19%**
- Insurance General Account **15%**
- SWF / World Bank / IMF **5%**
- Family Office Fund(s) **4%**
- Superannuation Fund **3%**
- Other **7%**

*Chief Investment Officer Registered User Database
Thought Leadership

Create and publish your thought leadership content on our Chief Investment Officer website to showcase your expertise and raise the awareness of your brand in front of our highly influential CIO readers. Each article produced is published on ai-cio.com and then actively promoted through our home page, CIOAlert newsletter and various social channels. Whether you have content already created to distribute or need support to create the right message, CIO can help.

THOUGHT LEADERSHIP (Conducted Interview)

Using a moderated-discussion format between a senior CIO editor and key executives at your firm, we will write an article centered around a topic of compelling interest to the institutional investment community and elaborate on the characteristics that distinguish your firm from your competitors. This article will be designed for the web by CIO with final approval by the client.

SUPPLIED THOUGHT LEADERSHIP

You provide CIO with approved content for your thought leadership article. We’ll design the piece for our website. We just need the native application file for the article, including: all text content, images, charts, and logos used in the article.

PROFILE/CONDUCTED Q&A OR ROUNDTABLE

<table>
<thead>
<tr>
<th>1000 words</th>
<th>$15,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional 250 words</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

SUPPLIED WHITE PAPER/ARTICLE

<table>
<thead>
<tr>
<th>1–4 page</th>
<th>$10,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longer articles</td>
<td>TBD</td>
</tr>
</tbody>
</table>

All thought leadership is published on the ai-CIO.com website and tagged with up to five relevant content tags to ensure readers interested in your subject matter find your article. Additionally, your thought leadership piece is posted on the ai-CIO.com Thought Leadership section and promoted with the following:

- Two Native In-feed Text Ads on the homepage (one per month)
- Two CIOAlert Native Sponsored Messages (one per month)
- Two Banner Ads in CIOAlert (one per month)
- Featured in two editions of Thought Leadership Roundup monthly newsletter
- Social promotion via Facebook, Twitter, and LinkedIn

NOTE: Banner ads created by Chief Investment Officer design team and approved by client prior to use. Native In-feed Text Ad and CIOAlert Newsletter Native Sponsored Message copy will be based on title and description of Thought Leadership article.

ADVERTORIAL GUIDELINES: All thought leadership must be clearly and immediately recognizable as advertorial content. The company name/logo must appear prominently and the words ‘SPONSORED SECTION’ or ‘SPECIAL ADVERTISING SECTION’ must appear on each page.
2018 Conferences and Awards Programs

Establish your firm as a thought leader

Chief Investment Officer summits, forums and awards dinners consistently attract top investment officers from the world’s most prominent pension, endowment, foundation, insurance, and sovereign wealth funds. Each event includes a limited number of sponsorship opportunities—providing exceptional exposure to this highly influential group of asset owners and their consultants.

Conference sponsorships include various speaking opportunities such as keynotes, fireside chats and panelist positions. Awards dinner sponsorships provide exceptional one-on-one networking opportunities, and all sponsorships receive extensive branding, attendee passes, and access to the attendee list before and after the May 10–11, 2018 event.

ATTENDEE FEEDBACK

“Chief Investment Officer is really the only industry organization that focuses on the complete role of the CIO, not just in the traditional limited capacity of an asset allocator and/or manager selector, but with an eye toward the important additional roles of portfolio constructor and risk manager. They are rapidly gaining support from many of the most forward looking and innovative thinkers in the CIO seat.” – CORPORATE PENSION FUND EXECUTIVE

“It is definitely worth attending, particularly for the number of asset owners of influence at the event. The caliber of institutional investors at the event is first class.” – FOUNDATION EXECUTIVE

“This event is simply without peer on the investment conference circuit in terms of the sheer number and stature of CIO, investment committee and other similar senior investment decision makers, range and quality of panel discussions, and centrality of venue.” – PUBLIC PENSION FUND EXECUTIVE

SAMPLE AUDIENCE PROFILE

- Asset Owners 61%
- Investment Consultants 13%
- Providers 26%

AUDIENCE SIZE AND BALANCE

What sets CIO conferences and awards dinners apart is our unrivaled track record of delivering a balanced audience consisting of the right amount of asset owners, their consultants and our provider sponsors. In 2017, for example, the New York Summit audience consisted of 61% asset owners, 13% consultants and 26% providers. This 3:1 ratio of potential/existing customers vs. vendors is typical and ensures optimal networking time for the select group of vendors in the room.

Chief Investment Officer Summit
New York City
May 10–11, 2018

CIO Industry Innovation Awards
New York City
December 2018

CIO Influential Investors Forum
New York City
December 2018

This calendar is subject to change.

Sponsorship Info: Katie Bacon; +1 203-595-3184; katie.bacon@strategic-i.com

General Info: Carol Popkins; +1 203-595-3282; carol.popkins@strategic-i.com
Webcasts

Deliver your targeted thought leadership message and generate highly qualified leads.

Editor vs. Client Driven

CIO offers two choices for your webcast delivery. You can collaborate with a CIO editor to develop your content theme, identify the right speakers and moderate the session OR you can leverage our brand, our marketing and our production capabilities to host your own webcast without editorial representation. The choice is yours.

A Full-Service Experience

- Extensive pre-webcast marketing campaign (complete with social, email, newsletter and site wide promotion).
- Ability to customize your webcast experience through our ON24 webcast platform
- Opportunity to add up to three custom questions to the registration page
- Attendee registration management including approval/denial options (at the individual and domain level)
- Technical management before, during and after the webcast
- Audience ROI reporting dashboard featuring real-time access to contact info, attendee activity and lead scoring

Webcast Marketing Campaign

- Four emails sent to the CIO digital subscriber database
- One editorial post in the CIOAlert e-newsletter
- One native in-feed text ad on the ai-cio.com homepage
- Social promotion via Facebook and Twitter
- Listing in the Upcoming Webcasts section of ai-cio.com

Customize Your Webcast Experience

The ON24 platform offers a wide variety of tools to fully engage your audience including:

- Slide viewer
- Media player
- Speaker bios
- Q&A tools
- White paper downloads
- Live polling/surveys
- Contact us
- Company URL linking
- Social media feeds
- CE certification

Lead Intelligence Dashboard

Access up to the minute registration information and lead intelligence through our special dashboard.

- View registration counts, attendee conversion rates, audience activity
- Download a complete lead list including contact details and answers to your registration questions
- Know who did what in terms of Q&A, live polling and resources downloads
- Leverage proprietary lead engagement scoring for better post event communication

Investment

*Editorially-led Webcast: $25,000
*Client-led Webcast: $20,000

LATEST TRENDS IN DB PENSION RISK MANAGEMENT

Tuesday | December 12, 2017 | 12:00 - 1:00 p.m. ET

Join us for this EXCLUSIVE Webcast

Mike Jarosits, CFA, and Francois Pellerin, FSA, EA, CFA, leverage their extensive learnings from plan sponsors, consultants, and pension stakeholders to share current trends, opportunities, and issues impacting U.S. DB plan stakeholders.

Specifically, this session addresses how areas such as investment opportunities and threats, economic environment, political landscape, and corporate finance optimization, could impact DB plan sponsors' decision making during these challenging times for pension investors.
CIOAlert Newsletter

CIRCULATION BASE: 24,250  
FREQUENCY: Daily  
AVERAGE OPEN RATE: 22%

CIOAlert is an email newsletter that reaches the world’s most sophisticated capital owners. CIOAlert delivers updates on news and information that is crucial for managing large pension funds, sovereign wealth funds, and foundations.

CIOALERT ADS

- Leaderboard (728x90)  
- Island (300x250)  
- CIOAlert Native Sponsored Message

RATES

Leaderboard: $1,250 net  
Island: $1,250 net  
CIOAlert Native Sponsored Message: $1,250 net  
Roadblock of CIOAlert newsletter (Both banners and Native Sponsored Message ad): $3,000 net

CUSTOM NEWSLETTER & EMAIL BLAST SPONSORSHIP

Custom newsletters are a way to pair original client sponsored content along with unbiased third-party stories. Each client has the opportunity to contribute half of the newsletter’s content (about four to six links) in addition to all advertising placements. Custom newsletters allow your firm to expand your presence, establish your expertise in a specific topic area, and directly connect with a key target audience.

Email Blast is a supplied HTML message from an advertiser sent to CIOAlert’s newsletter audience

$15,000 net per Custom Newsletter  
$15,000 net per blast

THOUGHT LEADERSHIP ROUND-UP

Chief Investment Officer is pleased to present the next edition of our Thought Leadership Round-Up newsletter. Here we feature articles, whitepapers, and webcasts from thought leaders in the industry. The content is intended to help CIOs gain deeper understanding of nascent trends and provide key insights and analysis on the institutional investment space.

FEATURED WHITE PAPERS

  Sponsored by Enterprise Iron  
- Unlock The Power Of Wellness Effect For Your Business Discover Prudential’s unique POV and best practices for implementing financial wellness solutions.

FEATURED WEBCASTS

- How Financial Wellness Programs Benefit Both Employees & Employers  
  Sponsored by GRP Advisor Alliance  
- Weighing the Pros and Cons of Outsourcing Investment Decisions  
  Sponsored by PNC Retirement Solutions

To subscribe, click here
Video

Increase the impact of your firm’s message by working with C/O to produce an exclusive video interview that highlights an executive in your firm and showcases your organization as an industry thought leader, or provide a produced video of your firm and let C/O host and publicize it for you.

**Exclusive video interview**

Online video consumption is exploding. C/O has the tools to help you produce and distribute high impact video content. Leveraging our production capabilities, you can conduct an interview with a C/O editor, use your own interviewer or simply incorporate text-based transitions during the editing process. Our experienced team will consult with you to help transform your thought leadership message into an engaging video or video series that will inform, entertain and create those “aha” moments with the audience that will lead to further engagement.

**Video series ‘short takes’**

Shorter video segments offer an easy way to extend your messaging over a longer period of time with videos that are more likely to hold a viewer’s attention from beginning to end. In most situations, our production team can edit your video shoot into shorter segments that can then be promoted individually over a longer period of time. Each video segment in the series includes a complete promotional campaign.

**Supplied video content**

If your video is already produced and you are seeking ways to reach chief investment officers viewers, we can post and promote your video on our ai-cio.com.

**Video promotional campaign**

At the core of each video opportunity is a comprehensive marketing campaign designed to generate viewership from the C/O community. Each video is posted in the ai-cio.com video section for 60 days and includes the following promotional campaign:

- Two In-feed Native Text Ads on the homepage (one per month)
- Two Native Sponsored Message ads in C/OAlert Daily newsletter (one per month)
- Two Banner Ads in C/OAlert Daily newsletter (one per month)
- Featured in two editions of Thought Leadership Roundup monthly newsletter
- Video player can be linked and tracked with any outside Website
- QuickTime/Windows Media File to be provided at no additional fee

**NOTE:** Banner ads created by CIO design team and approved by client prior to use. In-feed native text ad and native sponsored ad based on title and description of video.

**Investment:**

- Editorial-led Video Interview: $12,500
- Client-led Video Interview: $10,000
- Video Series ‘Short Takes’ (per additional segment): $3,000
- Supplied Video (posted and promoted): $7,500

**NOTE:** All pricing is net. Interview pricing is based on a single interviewee. Additional fees may apply for additional participants in the shoot to cover the cost of additional cameras and crew.
White Paper Lead Generation Program

Leverage the power of our audience and use it as a platform to introduce and promote your firm’s whitepapers. Allowing our website to host and publicize your whitepaper delivers it to a wider audience, enhances its impact, and strengthens your brand.

All white papers are posted on the ai-CIO.com Video section for 60 days and promoted with the following:

- Two Native In-feed Text Ads on the homepage (one per month)
- Two CIOAlert Native Sponsored Messages (one per month)
- Two Banner Ads in CIOAlert (one per month)
- Featured in two editions of Thought Leadership Roundup monthly newsletter

NOTE: Banner ads created by Chief Investment Officer’s design team and approved by client prior to use. Native In-feed Text Ad and CIOAlert Newsletter Native Sponsored Message copy will be based on title and description of Thought Leadership article.

DETAILS

- Contact information of all readers captured prior to access
- Abstract rotates on “Industry Whitepaper” box on homepage

MATERIAL SPECIFICATIONS

- Pdf of white paper or link to download
- Title of white paper (max of 60 characters or less)
- Company logo; 200x200 px; TIF, GIF, JPG high resolution format preferred
- Tracking pixels not accepted
- Short description of white paper (max of 100 characters including spaces)
- Long description (max of 1000 words or less)

LEAD CAPTURE FIELDS AVAILABLE

- Work email—required
- First Name—optional
- Last Name—optional
- Company Name—optional
- City—optional
- State/Region—optional
- Country—optional
- Zip/Postal Code—optional
- Phone—optional
- Company Size—optional
- Firm’s asset size at holding company level—optional
- Job Title Industry—optional

$5,000 per whitepaper

For general information please contact:

Paul Zampitella
VP, Global Sales Online and Digital Media
Strategic Insight
1055 Washington Blvd.
Stamford, CT 06901
paul.zampitella@strategic-i.com
+1 617-670-4706
Facebook Retargeting

Target your thought leadership, research, video or special announcements to C/O readers on Facebook. Using Facebook’s social retargeting technology, C/O has accumulated a substantial audience of Facebook users who also visit the ai-cio.com website. This proprietary association allows you promote your content to our readership in a whole new way—directly through their Facebook social feed—for high impact branding and engagement.

**HERE’S HOW IT WORKS:**

- C/O User
- User visits ai-cio.com
- User leaves and is tracked
- User goes to social media channel
- User sees your ad on their feed

**Unique Facebook Retargeted Users**

79,000 (as of 11/2017)

**Retargeting options**

- Promote thought leadership, research, video or special announcements
- Include image, title, description and link to your site or back to ai-cio.com
- Option to embed in-feed video player

*Investment: $100 CPM*
Website (www.ai-cio.com)

AVERAGE UNIQUE VISITORS MONTHLY: 42,000
AVERAGE PAGE VIEWS MONTHLY: 145,000

Chief Investment Officer’s site brings asset owners up-to-the-minute information regarding deals, trends, surveys, regulation, legal proceedings, and more. ai-cio.com has dedicated topic pages for the four main CIO responsibilities. It delivers keen analysis, unique editorial content, and comprehensive news coverage for the leaders of the asset management industry.

RUN OF SITE ADS
• Portrait (300x1050): $150 CPM net
• Large Rectangle (300x600): $150 CPM net
• Large Leaderboard (970x90): $150 CPM net
• Island (300x250): $135 CPM net
• Leaderboard (728x90): $135 CPM net

DAILY EXCLUSIVE SPONSORSHIPS
• Welcome Banner
• Homepage Wallpaper
• Native In-Feed Text Ad on Home Page
• Pencil Push-Down

RATES
Each Daily Exclusive Opportunity: $1,500 net

CIO LIST AND SURVEY SPONSORSHIPS
CIO lists are highly anticipated ranking of young, talented asset owners; leading consultants, the top 100 asset owners in the world, and recipients of the coveted Industry Innovation Award. CIO Surveys are conducted annually on Investment Outsourcing, Risk Parity Investment, Transition Management, and De-Risking Investing.

List and Survey Sponsorships:
• Investment Outsourcing (February)
• 40 under 40 (Late May)
• Knowledge Brokers/Top consultants (Early June)
• Transition Management (September)
• Power 100 (October)
• Liability Driven Investing (November)
• Industry Innovation Award Winners (December)

Exclusive Sponsorship Details:
• Roadblock of landing page (four banners)
• Roadblock of profiles (four banners)
• Sponsorship for first month: $5,000
• Sponsorship for two months: $7,500
• Sponsorship for three months: $10,000
• Sponsorship for six months: $15,000
• Sponsorship for one year: $20,000
Online Advertising Specifications

**Run of Site**
- Leaderboard: 728x90; expandable 728x315
- Large Leaderboard: 970x90; expandable 970x250
- Island: 300x250; expandable 300x600
- Large Island: 300x600
- Portrait: 300x1050
- 200k maximum file size

**PREMIUM AD POSITIONS**

**Welcome Banner**
- 600x400: not expandable

**Pencil Pushdown (PPD)**
- 1040x60: expands to 1040x400

**Wallpaper**
- Total size: 1400x800 px
- PSD template will be provided

**Native Text Ad in News Feed**
- Headline: 70 character maximum including spaces.
- Body Copy: two lines of copy; 95 characters maximum including spaces per line.
- Tracking: One linking URL per ad. Click tags accepted. 1x1 tracking pixels accepted upon testing.
- Retargeting URLs not accepted.

**eNewsletter**
- Leaderboard: 728x90
- Island: 300x250
- CIOAlert Native Sponsored Message: (Header—one line, up to 75 characters including spaces; Body—three lines, up to 70 characters including spaces; Linking URL—third-party click tags accepted.

**FILE TYPES ACCEPTED AND FILE LIMITS**
- GIF/JPEG, HTML, DHTML, JavaScript; HTML5; accepted upon testing
- Third-party tags accepted. Please include image/link tracking documentation for macro implementation
- Three loop limit (animation must cease after fifteen seconds)
- HTML: No <span style> tags; without JavaScript preferred
- All third-party tags, Rich Media JavaScript/HTML/HTML5 creatives must be secure (SSL).
- All Rich Media ad must have static-back-up images. GIF, JPG, PNG, etc.

**HTMLS ADS**
- HTML5 creatives can be served directly in our ad server as a raw file or served through a third-party rich media vendor such as Doubleclick, JetPack or Pointroll.
- Initial Load: Asset files are immediately loaded when the ad tag is inserted in the page; max 200k
- Polite Load: All of the creative’s subsequent assets are loaded once the host webpage has completed loading; 2mb

**CLICKTAG INSERTION FOR HTML5**

```html
<html>
<head>
<meta name="ad.size" content="width=300,height=250">
<script type="text/javascript">
var clickTag = "http://www.google.com";
</script>
</head>

[The rest of your creative code goes here.]
</html>

Your creative must use the click tag variable as the click-through URL: 
<a href="javascript:window.open(window.clickTag)">
<img src="images/dclk.png" border=0>
</a>
```

**E-NEWSLETTER FILE SIZE/SPECIFICATIONS**
- 40k maximum file size
- GIF, JPEG and PNG format (third-party image tags not accepted)
- 1x1 pixels not accepted.
- Third-party click tags accepted
- No looping; no animation

---

**DIGITAL ADVERTISING Specifications**

**Welcome Banner**

**Run of Site**

**Wallpaper**

---

**Materials due five business days prior.**

Vanessa Leyden; +1 646-308-2760; adops@strategic-i.com

---

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.ai-CIO.com
Co-Sponsored Research

Partnering with Chief Investment Officer on a custom research study provides a unique way for clients to demonstrate expertise, generate awareness, and gather vital information in a specific area of the market.

Summaries of sponsored research will be published. Readers will be linked directly to the client for full details, providing a direct line of communication to leading global institutional chief investment officers. Elements of a co-sponsored research study can include the following:

- Unique questionnaire development (20–30 questions).
- Development of target audience and selection of targeted names from the Chief Investment Officer database of CIOs (selectable by plan type, assets, geography, and title)
- Programming of questionnaire, solicitation, and collation of anonymous responses.
- Response calculation and delivery of data in Excel and PowerPoint formats; PDF of published results summary.
- Design of four-page co-sponsored write-up, including research summary and showcase of your firm.
- Promotion in the CIOAlert

Timeline

Allow at least three months from questionnaire finalization to research publication in Chief Investment Officer.

Custom pricing available upon request.
Contact

Editorial
Vishesh Kumar
Editor-in-Chief
+1 646-308-2775
vishesh.kumar@strategic-i.com

Content Partnership / Events / Research
Katie Bacon
VP Group Publisher
+1 203-595-3184
katie.bacon@strategic-i.com

Digital
Paul Zampitella
VP of Global Sales Online & Digital Media
+1 781-249-4482
paul.zampitella@strategic-i.com