Our Mission
Over the past 10 years, retirement plan advisers have reshaped the face of retirement benefits programs and PLANADVISER has been there every step of the way—providing deep insight into the most pressing retirement plan challenges and strategies facing this specialized group. Our mission, through diverse media channels, is to identify and explore the most critical selling and servicing strategies and tactics facing retirement plan advisers and their clients.

Our Audience
Launched in 2006, PLANADVISER is the only magazine to address the specific needs and concerns of advisers who specialize in the sale and servicing of institutional retirement plans, including 401(k), 403(b), 457 and defined benefit (DB) plans.

Our Reach
PLANADVISER offers industry providers a powerful array of customer-driven marketing programs and information resources to strengthen your brand. No other media source can offer such a clear path to reach this influential and specialized group of advisers through our award-winning magazine, industry-leading events, daily online news, electronic newsletters, webcasts/multimedia, and social connections.

Awards
- Society of Illustrators for Art Direction
  Silver medal
- Communication Arts 2009 – 2017
- American Illustration 2009 – 2017
What We Do

**Magazine:** With its reputation for editorial integrity, objectivity and leadership, PLANADVISER is the trusted information and solutions resource for specialty advisers focused on the institutional retirement plan market. Feature your firm and establish your position as an industry leader by contributing to the content of our industry leading magazine.

**Events:** Through our PLANADVISER National Conference (PANC), we provide an annual meeting place for the top retirement plan advisers from across the United States. If your firm is seeking face to face contact with this specialist group of advisers, there is no better venue.

**Webcasts and Videos:** Through webcasts and video, we facilitate discussions of the latest trends, strategies and potential problems that plan advisers need to understand. Increase the impact of your firm’s message, and position your executives as leading voices through these high impact multimedia channels.

**Digital:** Every day on PLANADVISER.com, we deliver news and insight into the issues and changes that shape the retirement industry. Increase your brand awareness with exposure to our average monthly audience of 44,000 unique visitors.

**eNewsletters:** Our daily PLANADVISERdash newsletter is delivered every weekday to over 23,000 subscribing retirement plan advisers. Each issue provides the latest news and insight into the issues and changes that shape the retirement industry. Display and native advertising opportunities are available to distribute your message directly to our valuable subscriber base.

**Research:** Our position as a comprehensive information solution and the caliber of our audience enable us to conduct surveys and industry studies to assess what issues drive the retirement industry and are relevant to plan advisers. Partnering with PLANADVISER on a custom research project positions your brand in front of a unique group of influential subscribers and defines your organization as an industry leader.

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com
Features and Departments

Editor’s Letter*  
Musings from Alison Cooke Mintzer, global editor-in-chief.

Intro*  
A brief summary of what appears in the issue.

What’s Online?*  
Highlights from PLANADVISER’s website, with excerpts from features and online discussions.

Data Points*  
Spotlighting industry data and trends from PLANADVISER’s proprietary research.

Practice Development*  
Topics related to improving and evolving an advisory practice. For 2018, the focus will be on new revenue streams.

Investment Focus*  
A one-page spotlight on investment industry trends from Strategic Insight.

Research*  
The latest in PLANADVISER’s proprietary research.

Investment-Oriented*  
How plan advisers can help clients make the right choices for their investment menus.

Micro Scope (3x per year)  
A department that focuses on small plans with less than $20 million of assets under advisement.

Beyond(k) (3x per year)  
A department that focuses on other areas of a retirement plan adviser’s practice, including nonqualified deferred compensation, defined benefit plans, health savings accounts and 529 college savings plans.

Profile  
A feature about, or Q&A with, those making waves in the retirement plan adviser space.

Sales Champion  
Articles that help advisers boost their business, from prospecting through ongoing service.

Practice Management  
Tips on how to build and manage a retirement plan adviser practice.

Servicing Strategies  
Articles that discuss topics such as client retention, case studies in plan design, and trends in methods for increasing plan participation or deferral rates.

Regulatory Radar  
The latest from the regulatory and legislative front that will affect advisers and the plans they serve.

Client Communications  
Effectively reaching out to plan sponsors and participants.

Viewpoint  
An individual from the adviser or retirement community shares his thoughts about the industry.

Compliance Consult*  
Attorney David Kaleda of Groom Law Group discusses challenges advisers face and how to overcome them.

ERISA Vista*  
Attorneys Fred Reish and Joan Neri, from Drinker Biddle & Reath, answer questions from advisers about how the Employee Retirement Income Security Act applies to their circumstances.

Fiduciary Fitness*  
Assistance for plan advisers in understanding and coping with their top fiduciary concerns from a leading ERISA attorney, Marcia Wagner of Wagner Law Group.

*Runs in every issue.
# 2018 Edit Calendar*

<table>
<thead>
<tr>
<th>January–February</th>
<th>March–April</th>
<th>May–June</th>
<th>July–August</th>
<th>September–October</th>
<th>November–December</th>
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<tbody>
<tr>
<td>Published in February</td>
<td>Published in April</td>
<td>Published in June</td>
<td>Published in August</td>
<td>Published in October</td>
<td>Published in October</td>
</tr>
</tbody>
</table>
| **FEATURES/HIGHLIGHTS**<br>• Top 100 Retirement Plan Advisers<br>• Improving the Retirement Outlook: More Robust Policies for the Future<br>• Training the Investment Committee<br>• Catch-Up Contributions/Provisions<br>**DEPARTMENTS**<br>• Marketing Mechanics: The Value of Community Engagement<br>• Beyond(k): HSAs<br>• Investment-Oriented: ESG Investing<br>• 403(b)s<br>• Custom vs. Semi-Custom TDFs<br>**SURVEY/BUYER’S GUIDE**<br>• Micro-Plan Survey<br>**FEATURED ONLINE**<br>• Top 100 Retirement Plan Advisers: Profiles<br>• Deeper Dive: Micro Plans<br>• Communication and Education Policies<br>• Robo Advisers<br>**BONUS DISTRIBUTION: 2018 PLANSPONSOR NATIONAL CONFERENCE (PSNC)**<br>**ADVERTISER STUDY**<br>**FEATURES/HIGHLIGHTS**<br>• Retirement Plan Advisers of the Year<br>• The Role of an Adviser in Managing Client Litigation<br>• Hybrid QDIAs<br>• 3(38) Investment Management: Partnering<br>**DEPARTMENTS**<br>• Micro Scope: Assessing the Profitability of Micro Plans<br>• Beyond(k): NGDC Plans<br>• Investment-Oriented: Retirement Income<br>• Retirement Readiness<br>• Succession Planning<br>**FEATURED ONLINE**<br>• Advisers to the Plan Sponsors of the Year<br>• Deeper Dive: Advisers of the Year<br>• How Your Clients’ Health Care Concerns Affect Their Retirement Plans<br>• Adviser Tools<br>**Sponsored reservation: 4/13/17<br>Ad reservation: 5/11/18<br>Ad material: 5/18/18<br>Mail date: 6/19/18**<br>**BONUS DISTRIBUTION: 2018 PLANADVISER AWARDS DINNER**<br>**FEATURES/HIGHLIGHTS**<br>• Effectively Responding to an Employer RFP<br>• Assessing TDFs<br>• Clean Shares<br>• Expanding Your Client Base<br>**DEPARTMENTS**<br>• Marketing Mechanics: Maximizing Your Home Office Space<br>• Beyond(k): 529s<br>• Investment-Oriented: Alternatives<br>• Brokerage Windows<br>• Financial Wellness<br>**SURVEY/BUYER’S GUIDE**<br>• DCIO Survey<br>**FEATURED ONLINE**<br>• The Adviser-Sponsor “Vibe”<br>• Deeper Dive: DCIO<br>• Executive Compensation<br>• Multiple Employer Plans (MEPs)<br>**Sponsored reservation: 2/19/18<br>Ad reservation: 3/19/18<br>Ad material: 3/26/18<br>Mail date: 4/17/18**<br>**BONUS DISTRIBUTION: 2018 PLANSPONSOR NATIONAL CONFERENCE (PSNC)**<br>**ADVERTISER STUDY**<br>**FEATURES/HIGHLIGHTS**<br>• Rollovers in the Age of the Fiduciary Rule<br>• Changing Matching Formulas to Drive Better Outcomes<br>• Managed Accounts<br>• Tailoring Participant Communications<br>**DEPARTMENTS**<br>• Micro Scope: Unique Service Models<br>• Beyond(k): Student Loan Debt Relief<br>• Investment-Oriented: Fixed Income<br>• Third-Party Administrators<br>• ETFs<br>**SURVEY/BUYER’S GUIDE**<br>• Recordkeeper Services Guide<br>**FEATUREED ONLINE**<br>• Effective Participant Communication Campaigns<br>• Deeper Dive: Recordkeeping<br>• Fee Policy Statements<br>• Post-Retirement<br>**Sponsored reservation: 6/15/18<br>Ad reservation: 7/13/18<br>Ad material: 7/20/18<br>Mail date: 8/21/18**<br>**BONUS DISTRIBUTION: 2018 PLANADVISER NATIONAL CONFERENCE (PANC)**<br>**FEATURES/HIGHLIGHTS**<br>• Big Data and the Challenges in Measuring Plan Success<br>• Designations and Continuing Education<br>• Adviser Teams<br>• Balanced Funds as the QDIA<br>**DEPARTMENTS**<br>• Marketing Mechanics: Partners and Centers of Influence<br>• Beyond(k): Pension Risk Transfer<br>• Investment-Oriented: CIEs<br>• Stable Value Funds<br>• NGDC<br>**SURVEY/BUYER’S GUIDE**<br>• Retirement Plan Adviser Survey<br>**FEATUREED ONLINE**<br>• Using Digital Means to Connect With Participants<br>• Deeper Dive: Provider Services<br>• Insurance<br>• ESG Investing<br>**Sponsored reservation: 10/17/18<br>Ad reservation: 11/14/18<br>Ad material: 11/21/18<br>Mail date: 12/20/18**<br>**BONUS DISTRIBUTION: BEST OF PSNC 5-CITY CONFERENCE ADVERTISER STUDY**

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*This calendar is subject to change. Mail dates subject to change.
**MAGAZINE REACH – PRINT & DIGITAL**

- **15,101** Total Circulation
- **7,929** Digital Subscribers
- **7,172** Print Subscribers

**AUDIENCE PROFILE**

* I work for a
  - Registered Investment Adviser: 34%
  - Securities Brokerage/Broker-Dealer: 16%
  - Wirehouse: 8%
  - Regional Brokerage: 3%
  - Insurance: 6%
  - Bank or Trust Company: 6%
  - Pension Fund Consulting Firm: 23%
  - Other (Law Firm, Actuary, CPA, etc): 4%

**MAGAZINE REACH – PRINT & DIGITAL**

* Please indicate your retirement plan assets under advisement/management
  - More than $1 Billion: 23%
  - $500MM-$1B: 8%
  - $250MM-$500MM: 9%
  - $100MM-$250MM: 9%
  - $50MM-$100MM: 12%
  - $25MM-$50MM: 9%
  - $10MM-$25MM: 12%
  - Less than $10MM: 19%

* How many retirement plans do you currently have under advisement?
  - More than 40: 33%
  - 31-40: 5%
  - 21-30: 7%
  - 16-20: 6%
  - 11-15: 11%
  - Less than 10: 38%

Source: PLANADVISER Magazine Subscription Data

**Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com**
AUDIENCE PROFILE

For how many years have you been an adviser to the retirement plan clients?

- More than 15 years: 44%
- 10-15 years: 16%
- 8-10 years: 8%
- 5-8 years: 9%
- 3-5 years: 8%
- Less than 3 years: 16%
- Not applicable: 6%

Approximately what percentage of your assets under advisement represents retirement plans?

- 100%: 32%
- 90 - 99%: 8%
- 75 - 89%: 9%
- 50 - 74%: 13%
- Less than 50%: 31%
- Not applicable: 7%
**Digital Reach**

**Digital Traffic (Monthly)**
- 44,000 Unique visitors
- 135,000 Page views
- 2:45 Minutes Avg Time spent on site

**Social Footprint**
- Twitter Followers: 5,075
- Facebook Retargeted users: 89,000
- LinkedIn Retargeted users: 31,000

**AUDIENCE PROFILE**

**I work for**
- Financial Adviser (RIA-only): 19%
- Financial Adviser (Dually Registered): 10%
- Financial Adviser (Broker dealer affiliated): 11%
- Financial Adviser (Wirehouse affiliated): 4%
- Financial Adviser (other): 3%
- Investment Consultant: 14%
- Bank or Trust Company: 6%
- Insurance Brokerage: 4%
- Other Retirement Services (e.g. Law Firm, Actuary, CPA, etc.): 20%
- Other: 8%

**How many retirement plans do you currently have under advisement?**
- More than 40: 42%
- 31 to 40: 5%
- 21 to 30: 7%
- 16 to 20: 6%
- 10 to 15: 9%
- Less than 10: 30%

**Please indicate which retirement/savings plan types you service. (Check all that apply)**
- 401(k): 90%
- 403(b): 64%
- 457: 44%
- Defined Benefit: 62%
- Cash Balance / Hybrid Plan: 47%
- Non-Qualified Deferred Compensation Plan: 49%
- Executive Compensation Plans: 37%
- Health Savings Account: 23%
- 529 or Other College Savings Plan: 22%

**PLANSPONSOR registered user database**
AUDIENCE PROFILE

For how many years have you been an adviser to the retirement plan clients?

- More than 15: 45%
- 10 to 15: 13%
- 8 to 10: 6%
- 5 to 8: 6%
- 3 to 5: 9%
- Less than 3: 21%

Approximately what percentage of your assets under advisement represents retirement plans?

- 100%: 39%
- 50-74%: 13%
- 75-89%: 10%
- 90-99%: 11%
- Less than 50%: 26%

Please indicate your retirement plan assets under advisement/management

- More than $100B: 6%
- $50B-$100B: 5%
- $10B-$50B: 5%
- $5B-$10B: 5%
- $1B-$5B: 15%
- $500MM-$1B: 9%
- $200MM-$500MM: 12%
- $50MM-$200MM: 16%
- $10MM-$50MM: 8%
- $5MM-$10MM: 3%
- $1MM-$5MM: 5%
- Less than $1 million: 9%
## Magazine Display Advertising

### Magazine Advertising Rates

<table>
<thead>
<tr>
<th></th>
<th>1x</th>
<th>3x</th>
<th>6x</th>
</tr>
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<tbody>
<tr>
<td><strong>4-Color Process</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full Page</td>
<td>$12,500</td>
<td>$11,875</td>
<td>$11,250</td>
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<tr>
<td>Two-Page Spread</td>
<td>$21,875</td>
<td>$20,781</td>
<td>$19,688</td>
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<tr>
<td><strong>Premium Positions</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cover 2 — Inside Front Cover</td>
<td>$15,625</td>
<td>$14,844</td>
<td>$14,063</td>
</tr>
<tr>
<td>Cover 3 — Inside Back Cover</td>
<td>$14,375</td>
<td>$13,656</td>
<td>$12,938</td>
</tr>
<tr>
<td>Cover 4 — Outside Back</td>
<td>$15,625</td>
<td>$14,844</td>
<td>$14,063</td>
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<tr>
<td>Opposite TOC/EIC Letter/Managing Editor Letter</td>
<td>$14,375</td>
<td>$13,656</td>
<td>$12,938</td>
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<tr>
<td><strong>Specialty Covers</strong></td>
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</tr>
<tr>
<td>Cover 2 Spread — Inside Front 2 Pages</td>
<td>$25,000</td>
<td>$23,750</td>
<td>$22,500</td>
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<tr>
<td>Tip-On/False Cover (Two Pages)</td>
<td>$25,000</td>
<td>$23,750</td>
<td>$22,500</td>
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<tr>
<td>Gatefold (Three Pages)</td>
<td>$34,375</td>
<td>$32,656</td>
<td>$30,938</td>
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</tbody>
</table>

### 2018 Magazine Closing Dates

<table>
<thead>
<tr>
<th>Issue</th>
<th>Reservations</th>
<th>Materials</th>
</tr>
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<tbody>
<tr>
<td>January / February</td>
<td>1/19/18</td>
<td>1/26/18</td>
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<td>March / April</td>
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<tr>
<td>July / August</td>
<td>7/13/18</td>
<td>7/20/18</td>
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<tr>
<td>September / October</td>
<td>9/17/18</td>
<td>9/24/18</td>
</tr>
<tr>
<td>November / December</td>
<td>11/14/18</td>
<td>11/21/18</td>
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</tbody>
</table>
MAGAZINE Display Advertising Specifications

PRODUCTION DETAILS

Advertising Units

<table>
<thead>
<tr>
<th>Unit</th>
<th>Vertical</th>
<th>Horizontal</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-pg spread, live area</td>
<td>—</td>
<td>15.5&quot; x 9.875&quot;</td>
</tr>
<tr>
<td>2-pg spread, bleed</td>
<td>—</td>
<td>16.75&quot; x 11.125&quot;</td>
</tr>
<tr>
<td>Live area, no bleed</td>
<td>7.25&quot; x 9.875&quot;</td>
<td>—</td>
</tr>
<tr>
<td>Full pg, bleed</td>
<td>8.5&quot; x 11.125&quot;</td>
<td>—</td>
</tr>
<tr>
<td>Trim size</td>
<td>8.25&quot; x 10.875&quot;</td>
<td>—</td>
</tr>
</tbody>
</table>

Standard Unit Size

- Trim size: 8 ¼" x 10 7/8"
- Allow 1/8" on all sides for bleeds

Print Method: Web offset lithography
Cover Stock: 100# Matte
Text Stock: 45# Matte
Binding: Saddle Stitched

Materials

Strategic Insight / Attn: Lynn Connelly
1055 Washington Blvd., Stamford, CT 06901 / +1 (203) 595-3262 / creative@strategic-i.com

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/X-1a 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.
Thought Leadership—Native Opportunity

The PLANADVISER magazine and planadviser.com website offer you two distinct industry-recognized platforms on which to showcase your expertise and raise the awareness of your brand. Each Thought Leadership article is published in PLANADVISER magazine and then also posted on planadviser.com and promoted through our website and newsletters. Whether you have content already created to distribute or need support to create the right message, PLANADVISER can help.

THOUGHT LEADERSHIP (Conducted Interview)
Using a moderated-discussion format between a senior PLANADVISER editor and key executives at your firm, we will write an article centered around a topic of compelling interest to the retirement plan adviser community and elaborate on the characteristics that distinguish your firm from your competitors. This article will be designed by PLANADVISER with final approval by the client.

SUPPLIED THOUGHT LEADERSHIP (Non-Printer Ready or Printer Ready)
You provide PLANADVISER with approved content for your Thought Leadership article. Supplied content that is not printer ready is designed by PLANADVISER with final approval from the client. Supplied printer ready content is sent to PLANADVISER as a printer ready PDF.

* In order to post supplied thought leadership to PLANADVISER.com, the client must provide the native application file for the article, including: all text content, images, charts, and logos used in the article.

Each Piece Is Published in PLANADVISER magazine and on PLANADVISER.com for Maximum Exposure!

ADVERTORIAL GUIDELINES
All advertorials and advertisements must be clearly and immediately recognizable as advertisements. The company name/logo must appear prominently and the words “SPONSORED SECTION” or “SPECIAL ADVERTISING SECTION” for supplied content must appear on each page.

Specs for supplied “digital only” content:
- Requirements: Content in the form of word document.
  Content should not exceed 1,000 words.
- Images or graphics: Native InDesign format.
  Hi-Resolution logo in JPG or GIF format.
- Links: http:// format.
- Title and Description of content: 80-120 character headline.
  180 - 360 character sub-headline.

All Thought Leadership pieces are posted on the PLANADVISER.com Thought Leadership section for 60 days and promoted with the following:
- Two Native in-feed text ads on the home-page (one per month)
- Two Native Sponsored Message ads in PLANADVISERdash newsletter (one per month)
- Two Banner Ads in NewsDash Daily newsletter (one per month)
- Featured in Two editions of Thought Leadership Round Up monthly newsletter

NOTE: Banner ads created by PLANADVISER design team and approved by client prior to use. Native in-feed text ads and native sponsored messages are based on title and description of Thought Leadership article.

Thought Leadership Rates
(Print + Digital)
Thought Leadership (conducted interview)
1 page: $19,500
2 page: $28,875
Additional pages: $9,375

Supplied Thought Leadership (Non-Printer Ready)
1 page: $17,000
2 page: $26,875
Additional pages: $9,875

Supplied Thought Leadership (Printer Ready)
1 page: $16,500
2 page: $25,875
Additional pages: $9,375

Digital Only
Conducted Interview: $15,000
Supplied Content: $12,000

Electronic Reprints (PDF)
1-4 pages: $3,750

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com
# PLANADVISER Survey and Buyer's Guides

<table>
<thead>
<tr>
<th>JANUARY/FEBRUARY</th>
<th>MAY/JUNE</th>
<th>JULY/AUGUST</th>
<th>SEPTEMBER/OCTOBER</th>
<th>NOVEMBER/DECEMBER</th>
<th>DIGITAL</th>
</tr>
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<tbody>
<tr>
<td><strong>2018 Micro Plan Survey</strong>&lt;br&gt;Our Micro Plan Survey focuses on the sweet spot for many retirement plan practices, comparing plans that have less than $1 million with those having $1 million to $5 million in assets.</td>
<td><strong>2018 PLANADVISER Defined Contribution Investment Only (DCIO) Survey</strong>&lt;br&gt;Our annual guide to DCIO providers: Assets, Top Funds, and Services they provide to retirement plan advisers.</td>
<td><strong>2018 Recordkeeper Services Guide</strong>&lt;br&gt;Our annual survey of DC Recordkeeping providers, with a particular focus on what services and value they deliver to advisers.</td>
<td><strong>2018 Retirement Plan Adviser Survey</strong>&lt;br&gt;Survey of advisers, indicating their perceptions of—and experience with—investment managers, mutual funds and DC Recordkeepers</td>
<td><strong>2018 PLANADVISER Practice Benchmarking Survey</strong>&lt;br&gt;Data from the Retirement Plan Adviser Survey, showing how advisers run their retirement practices—business structure, fees, provider relationships, marketing and service models, and concerns/expectations.</td>
<td><strong>Exclusive Sponsorship of Survey’s and Buyer's Guides on <a href="http://www.planadviser.com">www.planadviser.com</a> available.</strong>&lt;br&gt;Sponsorship includes roadblock of banner ads on all pages (728x90 and 300x250 banner units).&lt;br&gt;• Sponsorship for 1st month: $5,000&lt;br&gt;• Sponsorship for 2 months: $7,500&lt;br&gt;• Sponsorship for 3 months: $10,000&lt;br&gt;• Sponsorship for 6 months: $15,000&lt;br&gt;• Sponsorship for 1 year: $20,000</td>
</tr>
</tbody>
</table>
Digital Advertising

PLANADVISER.com

PLANADVISER.com offers visitors an inside look at the leaders in the retirement space and presents industry-leading ideas on an easy-to-access platform. Delivering current news, trend analysis, and retirement industry information to audience members, PLANADVISER.com supplements the strong content and focus of the magazine with interactive research, thought leadership, and multimedia libraries. Many sponsorship and promotional opportunities are available, from shared or exclusive sponsorships to premium and run-of-site advertising placements.

Monthly Averages

- Unique Visitors: 44,000*
- Page Views: 130,000*
- Time Spent on Site: two minutes 44 seconds

*Source: Omniture Analytics April 2016 - April 2017

Run of Site Banner Ad Rates

- Top Billboard (970x250 px): $150 CPM
- Top Super Leaderboard (970x90 px): $150 CPM
- Top Leaderboard (728x90 px): $150 CPM
- Portrait (300x1050 px): $150 CPM
- Top Large Rectangle (300x600 px): $150 CPM
- Top Island (300x250 px): $150 CPM
- Mid Leaderboard (728x90 px): $125 CPM
- Mid Island (300x250 px): $125 CPM
- Bottom Leaderboard (728x90px): $100 CPM
- Bottom Island (300x250px): $100 CPM

Exclusive Daily Sponsorships:

- Top Page Pushdown (1040x60 to 1040x400 px): $2,000
- Welcome Banner (600x400 px): $1,750
- Homepage Wallpaper: $1,750
- Native in-feed Text ad within “Latest News” on Homepage: $1,500
eNewsletter Advertising

**PLANADVISERdash eNewsletter**
Circulation base: 23,000

PLANADVISERdash is the daily email newsletter addressing specific needs and concerns of advisers specializing in the sale and servicing of institutional retirement plans. PLANADVISERdash delivers industry-relevant news, timely and topical coverage of industry developments, as well as the latest trends from our proprietary research. Published each workday morning, PLANADVISERdash focuses on ways to help the adviser succeed—leveraging the expertise and experience of the PLANADVISER franchise to provide the reader with practical and innovative adviser-centric solutions.

**PLANADVISER Weekend**
Circulation base: 16,250 subscribers

Each week PLANADVISER brings you the most popular articles of the week, curated by theme. The first Friday of the month will focus on Practice Management; second Friday, Investing; the third Friday of each month we will bring you articles focused on Client Service; and the fourth Friday will be focused on Health Care and Other Benefits. Five Fridays in a month happens only quarterly, but that week our topic will be Rollovers.

**Custom Newsletters and Email Blast**

PLANADVISER offers two ways for clients to be featured in custom newsletters. With the sponsor contributed content custom newsletter, each client has the opportunity to control up to half of the newsletter’s editorial content—about four to six links—in addition to all advertising placements. This content is paired with original content from the PLANADVISER editorial team and additional links to previously written relevant stories. Clients can also choose to sponsor the topic of the newsletter and all advertisement placements. PLANADVISER’s editorial team will provide all of the content for this newsletter. Custom newsletters allow your firm to expand its presence, establish its 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 PLANADVISER’s newsletter audience.

**PLANADVISERdash Ads**

- Top Leaderboard (728x90 px): $1,250 each newsletter
- Top Island (300x250 px): $1,250 each newsletter
- Mid Leaderboard (728x90 px): $1,150 each newsletter
- Mid Island (300x250 px): $1,150 each newsletter
- Native Sponsored Messages:
  - Header—one line; up to 75 characters including spaces
  - Body—three lines; up to 70 characters per line including spaces
  - Linking third-party click tags accepted
  - $1,000 each newsletter
- Roadblock of ads: $4,000

**Custom Newsletter Sponsorship**

- Top Leaderboard (728x90 px)
- Top Island (300x250 px)
- Mid Leaderboard (728x90 px)
- Mid Island (300x250 px)
- Sponsor Contributed Content: $10,000 net
- Topic Sponsorship: $5,000 net
- Email Blast Sponsorship: $10,000 net

**Week In Review Ads**

- Top Leaderboard (728x90 px): $1,000 each newsletter
- Large Rectangle (300x600 px): $1,000 each newsletter
- Roadblock of Ads: $1,750
Digital Advertising Custom Programs

**Microsite**

Opportunity to partner with PLANADVISER to create a branded section online around a specific topic relevant to the PLANADVISER audience. As the sponsor, your Thought Leadership material (white papers, videos, research) are posted in this section, along with content from PLANADVISER. Sponsors also get the opportunity to post an article(s), similar to the Industry Voices program, in the microsite. The microsite is featured on the PLANADVISER homepage, and promoted regularly during the sponsorship via sponsored messages and banner ads in AdviserDash daily, PLANADVISER week in review, and Thought Leadership round-up newsletter.

**Video Topic Page**

PLANADVISER’s Video Topic Page program uses an advertiser’s branded content, such as videos and white papers, on a specific topic. The Video Topic Page is promoted prominently on the home page and has a unique navigation choice from the Thought Leadership menu bar.

- Up to five supplied videos
- Up to three supplied white papers
- Banner Roadblock - top banner position (970x90 or 728x90), middle banner position (728x90) and lower banner position (300x250)
- Logo for promotion on website and newsletters
- Promotion on social media platforms

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**Microsite**

Investment: $20,000 per month

**Video Topic Page**

Investment: $20,000 for two-month campaign

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com
Digital Advertising Custom Programs

**Featured White Paper Program**

Leverage the power of PLANADVISER’s audience and use it as a platform to introduce and promote your firm’s white papers. Allowing PLANADVISER to host and publicize your white paper delivers it to a wider audience, enhances its impact, and strengthens your brand.

**Details:**

All White Papers are promoted with the following:

- Two Native In-feed Text Ads on the homepage (one per month)
- Two Native Sponsored Messages in NewsDash Daily Newsletter (one per month)
- Two Banner Ads in AdDash Daily newsletter (one per month)
- Featured in two editions of Thought Leadership Round Up monthly newsletter
- Promoted in two PLANADVISERdash Native Sponsored Messages
  - **Header**—one line; up to 70 characters including spaces
  - **Body**—three lines; up to 85 characters per line including spaces
  - **URL**—please send as http:// format, not www.

**White Paper Rates**

$5,000/White Paper

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**INDUSTRY WHITE PAPERS**

- A NEW FRAMEWORK FOR DC. GETTING PARTICIPANTS Awaiting no longer

A holistic framework for understanding risk across an entire DC.

**USING RISK TO MANAGE CLIENT EXPECTATIONS**

One of the biggest challenges that advisors face when working with their clients is properly setting and managing expectations for portfolio returns. As returns have been lower than expected, advisors are under growing pressure to provide the same level of investment performance at lower levels of risk. This context is particularly:

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**Using Risk to Manage Client Expectations**

One of the biggest challenges that advisors face when working with their clients is properly setting and managing expectations for portfolio returns. As returns have been lower than expected, advisors are under growing pressure to provide the same level of investment performance at lower levels of risk. This context is particularly:

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**Katie Bacon** / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com
Digital & eNewsletter Advertising Specifications

Run of Site PLANADVISER.com
- Billboard: 970x250 px
- Super Leaderboard: 970x90 px; expandable 970x250 px
- Leaderboard: 728x90 px; expandable: 728x315 px
- Portrait: 300x1050 px
- Large Rectangle: 300x600 px
- Island: 300x250 px; expandable: 300x600 px
- Bottom Leaderboard: 728x90 px
- Bottom Island: 300x250 px
- 200k maximum file size

Welcome Banner Premium Position
- 600x400 px
- 100k maximum file size

Pushdown Premium Position
- 1040 x 60 px collapsed; 1040 x 250 px expanded
- 100k maximum file size
- PSD template will be provided

Wallpaper Premium position
- Total size: 1400x800 px
- 200k maximum file size
- PSD template will be provided

Native Text Ad in News Feed Premium position
- 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.

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 &lt;span style&gt; 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.

HTML5 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; 2us

CLICKTAG INSERTION FOR HTMLS

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

Extension of your creative code goes here.

Your creative must use the click tag variable as the click-through URL:

```html
&lt;a href="javascript:window.open(window.clickTag)">
&lt;img src="images/dclk.png" border=0&gt;
</a>
```

 nuestras PLANADVISERdash

- Top Leaderboard (728x90 px)
- Top Island (300x250 px)
- Mid Leaderboard (728x90 px)
- Mid Island (300x250 px)
- Native Sponsored Message (Header—one line, up to 70 characters including spaces; Body—three lines, up to 85 characters per line including spaces URL—please send as http:// format, not www.)

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

Materials due five business days prior.

Vanessa Leyden / +1 (646) 308-2760 / adops@strategic-i.com
Cancellation only accepted two weeks prior to campaign start—i.e., 15th of month prior. Cancellation after deadline will result in penalty fee.
Facebook Retargeting

Target your thought leadership, research, video or special announcements to planadviser.com readers on Facebook. Using Facebook’s social retargeting technology, PLANADVISER has accumulated a substantial audience of Facebook users who also visit the planadviser.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**

1. Plan Adviser User
2. User visits PLANADVISER.com
3. User leaves and is tracked
4. User goes to social media channel
5. User sees your ad on their feed
6. User clicks ad to view your content (on our site or yours)

**Unique Facebook Retargeted Users**

89,000 (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 planadviser.com
- Option to embed in-feed video player

**Investment:** $100 CPM

**SOCIAL MEDIA**
Video

Increase the impact of your firm’s message by working with PLANADVISER 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 video your firm has already produced and let PLANADVISER host and publicize it for you.

Exclusive video interview

Online video consumption is exploding. PLANADVISER has the tools to help you produce and distribute high impact video content. Leveraging our production capabilities, you can conduct an interview with a PLANADVISER 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 plan sponsor viewers, we can post and promote your video on PLANADVISER.com.

Video promotional campaign

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

- Two Native in-feed native Text Ads on the homepage (one per month)
- Two Native Sponsored Messages in PLANADVISERdash Daily Newsletter (one per month)
- Two Banner ads in PLANADVISERdash daily newsletter (one per month)
- Featured in two editions of Thought Leadership Round Up 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 PLANADVISER design team and approved by client prior to use. Native In-feed text ads and native sponsored messages are 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.
A webcast is the perfect medium to generate highly qualified leads and establish your firm as an industry thought leader. At PLANADVISER, our webcast team works with you every step of the way to ensure that your message is aligned with our audience, your webcast is actively promoted to drive attendance and the experience for your participants is of the highest quality on the day of the event.

Editor vs. Client-Driven

PLANADVISER offers two choices for your webcast delivery. You can collaborate with a PLANADVISER 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 sitewide 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)
- Opportunity to extend your reach to the PLANSPONSOR audience
- 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 PLANADVISER digital subscriber database
- One editorial post in the PLANADVISER-dash e-newsletter
- One native in-feed text ad on the PLANADVISER.com homepage
- Social promotion via Facebook and Twitter
- Listing in the Upcoming Webcasts section of PLANADVISER.com

PLANSPONSOR Audience Extension

Expand your reach to the plan sponsor community by including a second promotional campaign to the audience of our sister publication, PLANSPONSOR. Your webcast will be promoted through email, newsletters and website channels with the same consistency as your campaign via PLANADVISER.

Customize Your Webcast Experience

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

- Slide viewer
- Media player
- Speaker bio
- 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
- PLANSPONSOR Audience Extension: $5,000

NOTE: In order to better target our marketing and limit exposure to those persons and parties our clients would prefer didn't attend our events, we offer the following options to restrict attendance to our events.

1. The client may submit an email list of attendees they wish to block from receiving email promotions. List may be in CSV or XLS format.

2. We can block potential registrants at the domain level, such as blocking all registrants with @"competitor_domain_abc.com" addresses.

3. We can leverage audience person identifying information data to filter out those who don't qualify for events from receiving marketing relating to it.

All Blocking must be in place prior to the launch of the campaign once a party registers they cannot be blocked or barred from attending.

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com
Events

PLANADVISER hosts a series of face-to-face events throughout the year to help you make direct connections with key retirement benefit decision-makers and influencers from across the country.

Each event offers numerous opportunities to participate as a keynote speaker or panelist; exceptional brand exposure before, during, and after each event; and ample time reserved throughout the program for face-to-face networking.

As a sponsor of a PLANADVISER event, you receive:

- Cost-effective exposure to America’s most influential retirement benefits decisionmakers
- The opportunity to position your firm as a thought leader
- Unmatched insight into key customer priorities
- Exceptional brand recognition
- The chance to demonstrate your commitment to your clients and associates
- Direct association with the PLANADVISER brand
- Excellent lead generation

### 2018 SCHEDULE OF EVENTS

**PLANSponsor/PLANADVISER Awards for Excellence Dinner**
March 29, Chelsea Piers, New York

**PLANSponsor National Conference (PSNC)**
June 13-15, Renaissance Hotel, Washington D.C.

**PLANADVISER National Conference (PANC)**
September 24-26, JW Marriott, Grande Lakes, Orlando

**The Best of PSNC (6 City Tour)**
Tour 1: November 13-15,
Tour 2: November 27-29

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**For General Information Contact**

Carol Popkins / +1 203-595-3282 / carol.popkins@strategic-i.com

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

Teaming with PLANADVISER to create co-sponsored research is a way to showcase and enhance expertise in a specific area of the market.

PLANADVISER will help you create a unique questionnaire and will identify a target audience for a timely and topical research study. A portion of the study results will appear in PLANADVISER (print and electronic versions), and readers will be directed to your company for the full details of the research, giving you a chance to communicate directly with interested members of the pension and investment community.

Elements of a co-sponsored research study can include the following:

- Questionnaire development (10-30 questions)
- Selection of targeted names from the PLANADVISER database of retirement plans, advisers, or providers (selectable by plan type, assets, geography, and title)
- Programming of questionnaire for online response
- Solicitation and collation of responses (anonymous)
- Response calculation and delivery to you in Excel format and PowerPoint presentation
- Design of 4-page co-sponsored piece in PLANADVISER magazine, including story and charts, with quotes from your firm
- PDF file of results as published
- Editorial mention of research in the PLANADVISER dashboard, with a link to the piece

Specifications
Allow at least three months from questionnaire finalization to research publication in PLANADVISER.

Cost
$25,000 – $120,000, depending on length of questionnaire, target market, and scope of project.
Industry Reports

Unique defined contribution benchmarking tools based on feedback from approximately 5,000 employers

**PLANSPONSOR Industry Reports in a nutshell**

- Consists of 50+ pages in PDF format
- Provides coverage of DC plans in 49 different industries
- Compares client plans to others by industry, asset class, and overall
- Are available with your firm’s branding or logo on every page
- Are distributable to sales staff or adviser networks, and can be posted on your client site behind a registration wall

**Every survey topic is covered in detail:**

- Comparisons by asset class
- Comprehensive analysis of dozens of areas of plan design
- In-depth coverage of DC plan design and investments, including:
  - participation rates and eligibility
  - automatic enrollment features
  - investment options
  - target-date funds
  - company match
  - loans and hardship withdrawals
  - investment advice
  - plan oversight and administration
  - adviser services

**INDUSTRIES COVERED**

- Accounting/CPA Firm/Financial Planning
- Advertising/Marketing/Printing
- Aerospace/Defense
- Agriculture
- Automotive Dealerships/Service
- Automotive Manufacturing/Parts
- Banking-Commercial/Retail
- Building/Construction/Contracting
- Business Services/Staffing
- Chemicals (new)
- Consulting
- Consumer Services
- Credit Union
- Distribution/Manufacturer’s Rep/Import/Export (new)
- Education-Higher Ed (new)
- Education-K12/Preschool/Daycare (new)
- Environmental, Recycling, Remediation, Testing, Consulting
- Engineering/Architecture
- Equipment Sales/Leasing/Service (new)
- Financial Services
- Fortune 1000
- Government/Public Workers-City/Municipal (new)
- Government/Public Works-County/State/Federal (new)
- Healthcare Organization (for profit)
- Healthcare Organization (not for profit)
- Hotels/Gaming/Entertainment/Hospitality/Travel
- Insurance/Reinsurance
- Investment Banking/Holding Co (new)
- Labor Union
- Law Firm
- Manufacturing-Consumer Products
- Manufacturing-Industrial Products
- Media/Communications/Publishing
- Membership Org/Industry Assn (new)
- Nonprofit Org/Endowment/Foundation
- Oil & Gas/Energy/Mining Pharmaceuticals
- Real Estate
- Religious Org/Social Services (new)
- Research & Development (new)
- Restaurant/Food Service
- Retail
- Technology/Computers/Software
- Telecommunications
- Transportation/Airline
- Utilities
- Wholesale
- 403(b) plans
- 457 plans

Katie Bacon / 203-595-3184 / katie.bacon@strategic-i.com / www.planadviser.com 24
Provider Satisfaction Research Report

These reports offer a comprehensive understanding of client perceptions of defined contribution providers—in each asset and market segment in which they compete.

Advantages

• Shows how DC providers are perceived by their own clients
• Presents a detailed picture of plan sponsor opinions
• Provides evaluations of all areas of plan design
• Delivers market-specific analysis for five separate markets
• Measures both sponsor and participant service capabilities

Uses

• Competitive benchmarking for providers, advisers, and plan sponsors to evaluate 48 different DC plan providers
• Objective third-party due diligence for annual plan reviews
• Value-added research for sales calls

Each report includes

• Market summary section
• Participant service and plan sponsor service scores
• Each provider’s score per question
• Each provider’s rank per question
• Each provider’s quartile per question
• Verbatim comments from clients

Contact

Brian O'Keefe / +1 203-979-3091 / brian.okeefe@strategic-i.com

Pricing

• Micro Market (≤$5MM in plan assets): $5,500
• Small Market ($5MM–$50MM): $5,500
• Mid Market ($50MM–$200MM): $5,500
• Large Market (>$200MM–$1B): $5,500
• Mega Market (>$1B): $5,500

Quantity discounts apply.
Reprints

Use the power of the PLANADVISER brand to promote your firm’s products, services, and industry expertise. PLANADVISER reprints help tell your story, lend credibility and marketing muscle to your promotions. Use reprints as printed collateral or electronic files for Web posting or emailing.

Print

- 80-lb. glossy stock (typical configuration; others configurations available)

<table>
<thead>
<tr>
<th>QTY</th>
<th>ONE-PAGE/ONE-SIDE</th>
<th>ONE-PAGE/TWO-SIDE</th>
<th>FOUR-PAGES/BOOKLET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>B/W</td>
<td>2 COLORS</td>
<td>4 COLORS</td>
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<td>$567</td>
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<tr>
<td>3,000</td>
<td>$1,071</td>
<td>$1,201</td>
<td>$1,571</td>
</tr>
</tbody>
</table>

PDF Usage Guidelines

- Posting to website; distribution via email; and unlimited print directly from PDF.

Copyright

- Reprints are copyrighted by Strategic Insight. All rights reserved.
- No production or redistribution without prior authorization.

Contact

Michelle Judkins, Reprints Manager / +1 203-595-3276 / michelle.judkins@strategic-i.com

Electronic Reprints—PDF

- Four pages: $3,750
- Six pages: $4,250
- Eight pages: $4,750

Cancellation

- $200 charge to cancel order prior to printing; orders canceled after printing will be billed at the full rate.

Additional Information

- If you would like a PDF set up for printer use, there is an additional fee of $850.
- Additional fees apply for photos, illustrations, disclaimers, and logos.
- Shipping charges are additional. All reprints are shipped via UPS ground unless otherwise instructed.
Contact

Print / Events

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