



## One of a kind

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) and defined benefit plans.

## The most powerful new force in retirement

Retirement plan advisers are reshaping the face of finance. *PLANADVISER* brings them the deep insight into retirement issues of parent *PLANSPONSOR* while also addressing the practical selling and servicing requirements advisers need to grow their practices.

## The most comprehensive information solution today

*PLANADVISER*, with sister Web site [www.planadviser.com](http://www.planadviser.com), *PLANADVISERdash* e-mail newsletter and the *PLANADVISER* National Conference, offers the first truly comprehensive news and information solution for this community.

### Contact us

Robert Jones  
VP, Global Publisher  
*PLANADVISER*  
1055 Washington Blvd.  
Stamford, CT 06901  
Tel: 203-595-3174  
Cell: 203-979-9720  
[rjones@assetinternational.com](mailto:rjones@assetinternational.com)

## 2012 Edit Calendar

### January-February

*published in February*

#### HIGHLIGHTS

- 5 Things That Will Change the Way You Do Business
- 2012 PLANADVISER Top 100
- 2012 Retirement Plan Adviser of the Year Finalists
- Defined Benefit Plans
- Marketing Strategies for 2012

#### RESEARCH/SURVEY

DC Industry Trends

#### ONLINE EXTRA

- Audio Interviews with Retirement Plan Adviser of the Year Finalists
- 2012 Compliance Calendar

Sponsored Reservation: 12/16/11

Ad Reservation: 1/6/12

Ad Material: 1/13/12

### March-April

*published in April*

#### HIGHLIGHTS

- Getting from “Just Enough” to “Good Enough”—Overcoming Plan Sponsor Objections to Plan Design
- 2012 Retirement Plan Adviser of the Year Winners
- Retirement Income Planning and Withdrawal Strategies
- IRA Rollovers
- 403(b) Plans

#### RESEARCH/SURVEY

Adviser Value

#### ONLINE EXTRA

Strategic Partner (CPA, ERISA Attorney, TPA) Directory

Sponsored Reservation: 2/13/12

Ad Reservation: 3/5/12

Ad Material: 3/12/12

### May-June (Buyer's Guide)

*published in June*

#### HIGHLIGHTS

- PLANADVISER Practice Manual: Keeping Your Practice Current in an Ever-Changing Industry, including:
  - Home office help
  - Target-date funds
  - ETFs
  - Collective trusts
  - Retirement income products and tools
  - Multiple employer plans

#### RESEARCH/SURVEY

DCIO Providers

#### ONLINE EXTRA

Custodian Buyer's Guide

Sponsored Reservation: 4/13/12

Ad Reservation: 5/4/12

Ad Material: 5/11/12

Bonus Distribution:

PLANSponsor National Conference

### July-August

*published in August*

#### HIGHLIGHTS

- Retirement Readiness and Plan Success Measures
- Technology and Practice Management
- Target-Date Funds
- Advising Small Businesses
- NQDC

#### RESEARCH/SURVEY

Recordkeeper Services Guide

#### ONLINE EXTRA

Top Providers by Plan Sponsors

Sponsored Reservation: 6/1/12

Ad Reservation: 6/22/12

Ad Material: 6/29/12

Bonus Distribution:

PLANADVISER National Conference

### September-October

*published in September*

#### HIGHLIGHTS

- Connecting with Automatically-Enrolled Participants
- Steering an Investment Committee
- Growing an Advisory Business: Hiring and Acquiring
- ETFs
- Designations and Continuing Education

#### RESEARCH/SURVEY

Adviser Opinions of DC Providers and Investment Managers

#### ONLINE EXTRA

Retirement Income Buyer's Guide

Sponsored Reservation: 7/16/12

Ad Reservation: 8/6/12

Ad Material: 8/13/12

Bonus Distribution:

PLANADVISER National Conference

**AD STUDY**

### November-December

*published in December*

#### HIGHLIGHTS

- Election Aftermath: What's Next for the Retirement Industry?
- Cross-Selling
- Retirement Income Products/Annuities
- RIA Products and Services
- Going Independent

#### RESEARCH/SURVEY

Benchmarking Your Practice  
DC Micro Plans

#### ONLINE EXTRA

Broker/Dealer Buyer's Guide

Sponsored Reservation: 10/19/12

Ad Reservation: 11/9/12

Ad Material: 11/16/12

## 2012 Custom Media Signature Series

PLANADVISER is the platform for distributing intellectual capital to retirement plan advisers. By pairing the print and digital media through sponsored editorial, video interviews, Webcasts, online advertising, and research, your firm will reach and influence our readership with an integrated message. For 2012, PLANADVISER is launching a bi-monthly series focused on a topic that matters to our readers and aligns with our editorial calendar.

JANUARY/FEBRUARY

• **The Defined Benefit Landscape**

Sponsored sign off January 20, 2012

MARCH/APRIL

• **Best in Class Practices for Retirement Income Planning/Withdrawal Strategies**

• **PLANADVISER Top 100 Profile\***

Sponsored sign off by March 20, 2012

MAY/JUNE

• **Five Ways To Keep Your Practice Competitive\*\***

Sponsored sign off by April 20, 2012

JULY/AUGUST

• **Trends in Target-Date Funds\*\*\***

Sponsored sign off by June 20, 2012

SEPTEMBER/OCTOBER

• **Five Things To Know about ETFs\*\*\***

Sponsored sign off by August 15, 2012

NOVEMBER/DECEMBER

• **DC Providers and Investment Managers Recap**

Sponsored sign off by November 20, 2012

Webcast topics for each month are exclusive and will be available on a first come, first served basis.

\*Cross-publication opportunity to feature in May issue of PLANSPONSOR.

\*\*Copies will be distributed at PLANSPONSOR National Conference

\*\*\*Copies will be distributed at PLANADVISER National Conference.

For pricing details, please contact your PLANADVISER salesperson.

FOR GENERAL INFORMATION CONTACT

ROBERT W. JONES / 203-595-3174 / rjones@assetinternational.com

**Select topics to share your firm's thought leadership by conducting:**

- Sponsored Editorial—Supplied white paper, 4-8 page roundtable, or 1-2 page profile.
- Custom Research
- Webcast + Webcast 360
- Video Interview with PLANADVISER, hosted at planadviser.com
- PLANADVISERdash



## Content

### Intro

A brief summary of what appears in the issue

### Talking Points

Information for advisers to use in employee presentations

### Learner's Permit

A tutorial about how advisers can use technology to further their practices

### Hot off the Press

An overview of the latest products and technology for retirement plans

### Trendspotting

A look at the latest concerns and actions among employees, and what they mean for advisers

### Diversions

#### Profile\*

Features on those making waves in the retirement adviser space

### Cover Story

#### Research/Survey

#### 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\*

- **Retention:** How do advisers please their clients?
- **Promoting Participation:** How advisers can assist clients with increasing plan participation—what options exist, what are some solutions?
- **Boosting Deferrals:** Offering suggestions for advisers to increase participant deferrals
- **Plan Designs:** Aimed at helping retirement plan advisers deliver solutions and innovative plan design to their clients

### Regulatory Radar\*

The latest from the regulatory and legislative front—what's coming, what's contemplated, and what's critical to advisers

### Investment-Oriented\*

How plan advisers can help clients make the right choices in their investment menus. Discussions of solutions for advisers to turn to in helping participants with asset allocations, consolidating multiple plan accounts, and living on their savings in

retirement—and how their practice can benefit from those solutions.

### Beyond(k)\*

News about the other areas of a plan adviser's practice including:

- Nonqualified
- Defined benefit
- Health care

### Micro Scope\*

A focus on the needs and issues surrounding small and micro plans

### Viewpoint\*

Someone from the adviser or retirement community shares thoughts about the industry

### Chalk Talk

Tips on building a successful 401(k) advisory practice from Steff Chalk, adviser to advisers

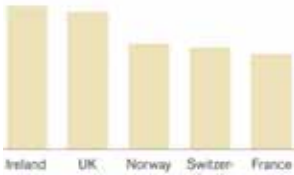
### Fiduciary Fitness

Assistance for plan advisers in understanding and coping with their top fiduciary concerns from a leading ERISA attorney

\* might rotate issue to issue



## Building Thought Leadership: The AI Integrated Media Approach



### Conduct a **Research Study**

Reach: Survey 500 or 2,000 key decision makers

Impact: Use survey data to show insight and leadership



### Hold **Webcast** on survey results

Reach: 250 to 500 attendees

Impact: Direct leads for sales team to act on, new business leads



### Conduct a **Roundtable Interview** with key executives on research results

Reach: 20,000 to 7,000 print and online circulation

Impact: Firm positioned as thought leader on research topic



### Feature a **Video Interview** with a executive discussing highlights of research

Reach: 20,000 for branding and 700 "views"

Impact: Position your executive as the thought leader in the industry



### Speak at **AI Conference**

Reach: 500 key prospects in face-to-face environment

Impact: Position your executive as the thought leader in the industry



### Targeted **Promotion and PR** via our websites and e-letters to build awareness and site traffic

Reach: 50,000+ for branding and 1,000+ directly to your website

Impact: Drive traffic and "downloads" and cross promotion

## Advertising & Sponsorship

### Advertising

Run of Page—Color	(\$1x)	(\$3x)	(\$6x)
Full Page	11,233	10,679	10,116
Double-Page Spread	22,480	21,356	20,233
2/3 Page	8,430	8,008	7,587
1/2 Page	7,305	6,941	6,576
1/3 Page	5,622	5,340	5,058
Special Positions	(\$1x)	(\$3x)	(\$6x)
Inside Front Cover	13,188	12,529	11,870
Inside front cover spread	26,377	25,058	23,739
Outside Back cover	13,676	12,991	12,308
Page opposite Table of Contents	12,700	12,067	11,431
Page opposite Intro	12,401	11,782	11,161
Page opposite Learner's Permit	12,253	11,639	11,027
Page opposite Talking Points	12,253	11,639	11,027
Inside back cover	12,215	11,604	10,993

### Specialty Covers

Tip-On/False Cover (Two Pages)	\$20,000*
Gatefold (Four Pages)	\$27,500*

\*gross amount

### Sponsorship

**Roundtables:** A sponsored section that features a moderated discussion between a senior *PLANADVISER* editor and key executives at the sponsoring provider. Discussion centers on a topic of compelling interest to the adviser community.

#### Costs:

- 2 pages: \$9,000 net per page
- 4 pages: \$8,000 net per page
- 6 pages: \$7,000 net per page

### Inserts, Booklets, and Customized Marketing

A sponsored stand-alone information insert or booklet glued into *PLANADVISER* magazine. It is designed to be removed easily and retained by readers. A high-impact way to build awareness of a product set.

- We offer turnkey expertise—from design, to editing, to production—in all types of collateral including booklets, inserts, and other custom products.
- Demonstrates expertise in, and command of, a particular topic.
- Exclusivity per topic per issue (1 per issue).
- 1,000 reprints included with PDF file (applies to inserts only).
- Requires six weeks lead time.

#### Costs:

- 1 page (two-sided): \$13,800
- 2 pages (four-sided) \$25,300

#### Costs: Booklets/Customized Marketing

- Estimated \$50,000 to \$75,000

### Web Site

#### Site Usage—Latest Month

- Unique Visitors 18,000\*
- Number of Impressions 900,000\*

\*Source: Dart Advertising System

#### Advertising

\$90/CPM open rate

#### File Sizes and Animation Specs

- Ⓐ Top Leaderboard (728x90)
- Ⓑ Skyscraper (160x600)
- Ⓒ Island (336x280)

#### 2012 PLANADVISERdash E-mail Newsletter Advertising Rate Card

Top Banner Ad (468 x 60)	\$825
Skyscraper Ad (160 x 600)	\$825
Island Ad (336 x 280)	\$825
Text Link Ad*	\$825

\*20-30 words with 5-word header and direct URL link.

### Contact us

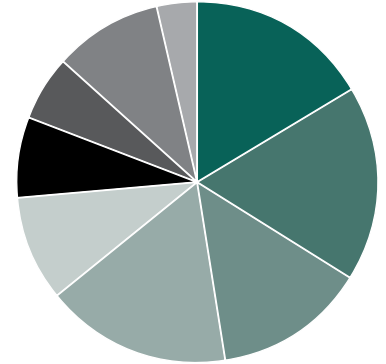
Robert Jones, VP, Global Publisher, *PLANADVISER*  
 1055 Washington Blvd. Stamford, CT 06901  
 Tel: 203-595-3174 Cell: 203-979-9720  
 rjones@assetinternational.com

### Readership and Circulation\*

Total circulation 15,000

### Geographic Distribution of PLANADVISER

South Atlantic	16.6%
East North Central	17.4%
Pacific	13.7%
Middle Atlantic	16.5%
West North Central	9.5%
West South Central	7.2%
Mountain	6.0%
New England	9.7%
East South Central	3.4%



### PLANADVISER Circulation Demographics

#### Adviser Type:

Independent Adviser	30.5%
Securities brokerage Broker/Dealer	13.9%
Wirehouse	13.3%
Regional brokerage	5.8%
Third-Party Administrator (TPA)	7.1%
Insurance	7.6%
Bank or trust company	5.7%
Plan provider/recordkeeper	7.3%
Mutual fund company investment provider	3.3%
Pension fund consulting firm	3.1%
CPA firm	1.3%
Law firm	1.1%

#### Retirement plan assets under management:

>\$1B+	6.9%
>\$500M-1B	4.3%
>\$250M-500M	5.3%
>\$100M-250M	8.6%
>\$50M-100M	9.7%
>\$25M-50M	11.1%
\$10M-25M	14.8%
<\$10M	16.0%
Not applicable	23.2%

#### Number of retirement plan clients:

<10	36.6%
10-15	15.3%
16-20	7.2%
21-30	7.2%
31-40	4.4%
>40	29.3%

#### Years of adviser experience with retirement plans:

<3	16.0%
3-5	11.6%
5-8	10.6%
8-10	10.1%
10-15	16.2%
>15	35.5%

#### % of business in retirement plans:

100%	26.1%
90-99%	8.6%
75-89%	9.5%
50-74%	14.5%
<50%	41.3%

#### Breakdown by plan types serviced:

401(k)	63.3%
403(b)	33.1%
457	18.0%
Nonqualified	27.3%
Defined benefit	31.0%
Other	7.3%

\* Source: Subscription data as of September 2011

## Advertising Specs

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.

**Print Method:** Web offset lithography

**Cover Stock:** 100 lb. UV Gloss

**Coated Text Stock:** 40 lb.

**Binding:** Saddle Stitched

### Standard Unit Sizes

Trim size: 8 1/4" x 10 7/8"

Spread: 16 1/2" x 10 7/8"

### Bleed Specifications

Allow 1/8" on all sides for bleeds

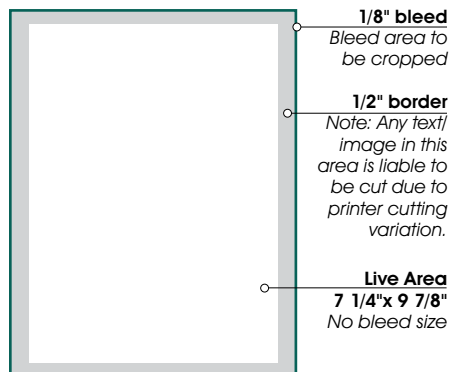
Single-page, bleed: 8 1/2" x 11 1/8"

Two-page spread, bleed: 16 3/4" x 11 1/8"

Unit	Vertical	Horizontal
Full page, no bleed:	7 1/4" x 9 7/8"	
Full page, with bleed:	8 1/2" x 11 1/8"	
2/3 page:	4 1/4" x 9 7/8"	7 1/8" x 6"
1/2 page:	3 3/8" x 9 7/8"	7 1/8" x 5"
1/3 page:	2 1/4" x 9 7/8"	7 1/8" x 3"

### 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
- Images are either Grayscale or CMYK
- Photo effective resolution for black and white line-art images should be more than 1200 dpi
- Resolution for gray scale 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



### 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

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, rather than the page-layout file.

**Native files are not acceptable.**

### False Cover Specifications

We would require a PDF X-1A file for each of the two pages and hard copy color proofs with registration marks.

Trim size: 8.25" x 10.875"

Live area: 7.25" x 9.875"

Bleed: 8.5" x 11.125"

Please keep in mind that any version of a tip-on cover that covers our masthead needs to have our masthead incorporated in the materials, as well as the word, 'Advertisement.'

Paper stock would be 100 #2 Gloss Book weight.

### Materials

Asset International Inc.  
 Attn: Lynn Connelly  
 1055 Washington Blvd  
 Stamford, CT 06901  
 203-595-3262  
 creative@assetinternational.com

## Audience Profile

The trusted information and solutions resource for retirement plan advisers

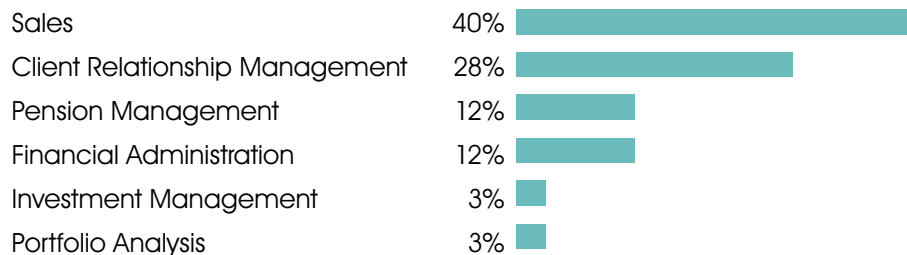
Since 2006, *PLANADVISER* provides comprehensive industry news, regulatory and investment information, research and training to financial advisers who specialize in the sales, design and administration of institutional qualified and nonqualified retirement plans and executive compensation plans, including 401(k), defined benefit and deferred compensation plans. We reach retirement plan advisers that matter most in all corners of the market—large and small—in the way they want to be communicated to, whether it is through our magazine, daily newsletter, Web site, Webcast program, or conference program.

## Reaching an Influential Readership

### Plan Demographics<sup>1</sup>

- 15,000 subscribers
- 12,344 pass-along readers
- Total Readers 27,344

### Decisionmaking Power<sup>2</sup>



<sup>1</sup>26% of readers are at companies with 100+ employees  
<sup>2</sup>2011 Readership Study

## 2012 Conferences, Seminars, and Awards Programs

### CONNECT FACE TO FACE



Conferences and events are essential to most marketers' strategies for the simple fact that no other medium enables you to strengthen existing customer relationships and develop new business opportunities like face-to-face meetings.

Throughout the year, *PLANADVISER* (along with our sister brands at *aICIO*, *PLANSPONSOR*, *Global Custodian*, *aiTrade*, and *Strategic Insight*) hosts a series of industry-leading conferences, seminars, and awards dinners to educate and honor our plan adviser, sponsor, and provider readers.

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. Combined, *PLANADVISER* provides a perfect venue for your company to make direct connections with the key retirement benefit plan advisor decisionmakers and influencers you have been trying to meet.

#### 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

#### Reach Your Prospects

While each conference, seminar, or awards dinner differs in terms of the audience it is designed to attract, *PLANADVISER* strives to deliver a balanced profile for each program so that the number of buyers far outweighs the number of sellers in the room. This emphasis on a proper audience balance allows for optimal networking and exceptional exposure to our valued sponsors.

*For specific audience size and profile targets for each event, please review the calendar and pricing grid on the following pages.*

#### FOR GENERAL INFORMATION CONTACTS

MIKE GARITY, 617-670-4710 / [mgarity@assetinternational.com](mailto:mgarity@assetinternational.com)

CAROL POPKINS, 203-595-3282 / [cpopkins@assetinternational.com](mailto:cpopkins@assetinternational.com)

#### TESTIMONIALS

"As usual, PANC was an excellent mix of great content and format with knowledgeable panelists."

*FLEISCHER JACOBS GROUP*

"I really enjoyed this conference, it was my first time and it was one of the most valuable DC conferences I have attended."

*ING INVESTMENT MANAGEMENT*

"This was my first conference and I look forward to attending next year. I thought the topics covered were good and timely with current market conditions."

*WELLS FARGO INSTITUTIONAL RETIREMENT & TRUST*

"The *PLANADVISER National Conference* has grown to become one of the premier networking and knowledge sharing conference in the industry today. If you are an expert who is committed to the retirement services industry it is to your advantage to attend this conference."

*GALLAGHER*

## 2012 Conferences, & Seminars Calendar\*

- 
- March**
- *Global Custodian Europe Awards Dinner March 15, The Savoy, London*
  - *PLANADVISER Top 100 Retirement Plan Advisers Seminar March 29, Chelsea Piers, New York*
  - *PLANSPONSOR/PLANADVISER Awards for Excellence Dinner March 29, Chelsea Piers, New York*
- 
- April**
- *aiCIO Chief Investment Officer Summit New York April 12–13, Harvard Club, New York*
- 
- June**
- *401(k) Boot Camp June 4, Fairmont Hotel, Chicago*
  - *PLANSPONSOR National Conference (PSNC) June 4–6, Fairmont Hotel, Chicago*
  - *Strategic Insight Fund Trends 2012 June 19–20, Chelsea Piers, New York*
  - *aiCIO Chief Investment Officer Summit London June 26, 8 Northumberland Avenue, London*
- 
- September**
- *401(k) Boot Camp September 10, JW Marriott, Grande Lakes, Orlando*
  - *PLANADVISER National Conference (PANC) September 10–12, JW Marriott, Grande Lakes, Orlando*
- 
- October**
- *Global Custodian Asia Awards Dinner October 4, Conrad Hotel, Hong Kong*
- 
- November**
- *Global Custodian US Awards Dinner November 8, New York*
  - *aiCIO Chief Investment Officer Summit Australia November 15, Shangri-La Hotel Sydney, Australia*
  - *PLANSPONSOR Europe Conference November 28–29, Hotel Arts, Barcelona, Spain*
- 
- December**
- *aiCIO Industry Innovation Awards December 4, Chelsea Piers, New York*
- 

\*This calendar is subject to change.

### FOR GENERAL INFORMATION CONTACTS

MIKE GARITY, 617-670-4710 / [mgarity@assetinternational.com](mailto:mgarity@assetinternational.com)

CAROL POPKINS, 203-595-3282 / [cpopkins@assetinternational.com](mailto:cpopkins@assetinternational.com)



## Conferences & Seminars Sponsorship Packages

### MARCH

MARCH 15, THE SAVOY, LONDON

#### **Global Custodian Europe Awards Dinner**

**TARGET AUDIENCE**

250 delegates

**SPONSORSHIP PACKAGES**

- Exclusive Pre-Dinner Cocktail Reception—\$25,000
- Exclusive Wine Sponsorship—\$15,000
- After-Dinner Dessert & Cocktails—\$20,000
- Chocolate Sponsor—\$12,500
- Advertisement in Award Dinner Program—\$5,000

MARCH 29, CHELSEA PIERS, NEW YORK, NY

#### **PLANADVISER Top 100 Retirement Plan Advisers Seminar**

**TARGET AUDIENCE**

50 delegates (100% adviser/consultants)

**SPONSORSHIP PACKAGES**

- Five Exclusive Sponsors—\$20,000

MARCH 29, CHELSEA PIERS, NEW YORK, NY

#### **PLANSORSPONSOR/PLANADVISER Awards for Excellence Dinner**

**TARGET AUDIENCE**

450 delegates (70% providers, 20% advisers/consultants, 10% plan sponsors)

**SPONSORSHIP PACKAGES**

- Exclusive Keynote Sponsor—\$35,000
- Pre-Dinner Cocktail Sponsor—\$25,000
- Awards Presentation Sponsor—\$25,000
- Wine Sponsor—\$20,000
- After-Dinner Cocktails Sponsor—\$20,000
- Table Sponsor—\$10,000
- Dinner Program Advertisement—\$7,500

### APRIL

APRIL 12-13, HARVARD CLUB, NEW YORK

#### **aiCIO Chief Investment Officer Summit New York**

**TARGET AUDIENCE**

150 delegates (50% asset owners, 25% advisers/consultants, 25% providers)

**SPONSORSHIP PACKAGES**

- Keynote Platinum (maximum of two)—\$45,000
- Gold (maximum of two)—\$35,000
- Silver (maximum of six)—\$25,000
- Bronze (maximum of five)—\$15,000

**FOR GENERAL INFORMATION CONTACTS**

MIKE GARITY, 617-670-4710 / mgarity@assetinternational.com

CAROL POPKINS, 203-595-3282 / cpopkins@assetinternational.com

### JUNE

JUNE 4, FAIRMONT HOTEL CHICAGO

#### **PLANSORSPONSOR 401(k) Boot Camp**

**TARGET AUDIENCE**

50 delegates (75% providers, 25% advisers/consultants)

**SPONSORSHIP PACKAGES**

- Three Exclusive Sponsors—\$21,000

JUNE 4-6, FAIRMONT HOTEL, CHICAGO

#### **PLANSORSPONSOR National Conference (PSNC)**

**TARGET AUDIENCE**

450 delegates (50% plan sponsors, 20% advisers/consultants, 30% providers)

**SPONSORSHIP PACKAGES**

- Keynote Sponsor (maximum of 2)—\$42,000
- Opening Night Sponsorship—\$40,400
- Conference Bag & Nametag—\$38,600
- Live Polling—\$33,000
- Coffee Breaks—\$27,600
- Day 2 Cocktail Party/Reception—\$26,300
- Branded Bottled Water—\$22,000
- Welcome Gift—\$22,000
- High Speed Internet (in room)—\$22,000
- Opening Buffet Lunch—\$16,600
- Day 2 Breakfast—\$16,600
- Day 2 Lunch—\$16,600
- Day 3 Breakfast—\$16,600
- Day 3 Closing Lunch—\$16,600
- Internet Kiosk—\$16,600
- Daily Newspaper—\$16,600
- Starbucks Gift Cards—\$16,600
- Conference Binder Notes & Pens—\$16,600
- Conference Mobile App Sponsorship—\$16,600
- Room Drop Sponsorship—\$16,600
- Exhibit Booths—\$9,400

JUNE 19-20, CHELSEA PIERS, NEW YORK

#### **Strategic Insight Fund Trends 2012**

**TARGET AUDIENCE:**

150 delegates

**SPONSORSHIP PACKAGES:**

- Keynote Platinum (exclusive)—\$25,000
- Gold (maximum of two)—\$17,500
- Silver (maximum of three)—\$12,500
- Bronze (maximum of fourteen)—\$7,500

JUNE 26, 8 NORTHUMBERLAND AVENUE, LONDON

#### **aiCIO Chief Investment Officer Summit London**

**TARGET AUDIENCE**

100 delegates (50% asset owners, 25% advisers/consultants, 25% providers)

**SPONSORSHIP PACKAGES**

- Keynote Platinum (exclusive)—\$30,000/€21,000
- Gold (maximum of two)—\$20,000/€14,000
- Silver (maximum of six)—\$15,000/€10,500

## Conferences & Seminars Sponsorship Packages *continued*

### SEPTEMBER

SEPTEMBER 10, JW MARRIOTT, GRANDE LAKES, ORLANDO

#### **PLANADVISER 401(k) Boot Camp**

TARGET AUDIENCE:

50 delegates (100% adviser/consultants)

SPONSORSHIP PACKAGES

- Three Exclusive Sponsors—\$22,000

SEPTEMBER 10-12, JW MARRIOTT, GRANDE LAKES, ORLANDO

#### **PLANADVISER National Conference (PANC)**

TARGET AUDIENCE:

450 delegates (70% advisers/consultants, 30% providers)

SPONSORSHIP PACKAGES

- Keynote Sponsor (maximum of 2)—\$69,600
- Opening Dinner—\$69,600
- Day 2 Cocktail Party /Reception—\$55,700
- Opening Night Cocktail Party—\$55,700
- Conference Bag & Nametag—\$48,700
- Day 2 Lunch—\$48,700
- Opening Buffet Lunch—\$41,800
- Closing Buffet Lunch—\$41,800
- Live Polling—\$36,300
- Opening Dinner Wine—\$34,800
- Wi-Fi Sponsorship—\$34,800
- Coffee Break—\$34,800
- High Speed Internet (in room)—\$34,800
- Golf Outing Lead (maximum of 2)—\$27,900
- Opening Night After-Dinner Cocktails—\$27,900
- Day 2 Breakfast—\$27,900
- Day 3 Breakfast—\$27,900
- Welcome Gift—\$27,900
- Branded Bottled Water—\$27,900
- Conference Notes and Pens—\$24,400
- Starbucks Gift Card—\$24,400
- Golf Outing Co-Lead (maximum of 2)—\$21,200
- Daily Newspaper—\$21,200
- Room Key Sponsorship—\$21,200
- Room Drop Sponsorship—\$18,200
- Conference Mobile App Sponsorship—\$18,200
- Exhibit Booth—\$18,200
- Table Top—\$15,200

### OCTOBER

OCTOBER 4, CONRAD HOTEL, HONG KONG

#### **Global Custodian Asia Awards Dinner**

TARGET AUDIENCE

250 delegates

SPONSORSHIP PACKAGES

- Exclusive Pre-Dinner Cocktail Reception—\$25,000
- Exclusive Wine Sponsorship—\$15,000
- After Dinner Dessert & Cocktails—\$20,000
- Chocolate Sponsor—\$12,500
- Advertisement in Award Dinner Program—\$5,000

### NOVEMBER

NOVEMBER 8, NEW YORK

#### **Global Custodian U.S. Awards Dinner**

TARGET AUDIENCE

250 delegates

SPONSORSHIP PACKAGES

- Exclusive Pre-Dinner Cocktail Reception—\$25,000
- Exclusive Wine Sponsorship—\$15,000
- After Dinner Dessert & Cocktails—\$20,000
- Chocolate Sponsor—\$12,500
- Advertisement in Award Dinner Program—\$5,000

NOVEMBER 15, SHANGRI-LA HOTEL SYDNEY, AUSTRALIA

#### **aiCIO Chief Investment Officer Summit Australia**

TARGET AUDIENCE

50 delegates (50% asset owners, 25% advisers/consultants, 25% providers)

SPONSORSHIP PACKAGES

- Keynote Platinum (exclusive)—\$25,000
- Gold (maximum of two)—\$15,000
- Silver (maximum of six)—\$10,000

### NOVEMBER

NOVEMBER 28-29, HOTEL ARTS, BARCELONA, SPAIN

#### **PLANSPONSOR European Conference**

TARGET AUDIENCE

150 delegates (50% plan sponsors, 20% advisers/consultants, 30% providers)

SPONSORSHIP PACKAGES

- Keynote Platinum (maximum of two)—\$35,750/€25,000
- Gold (limited availability)—\$28,500/€20,000
- Silver—\$10,750/€7,500

ADDITIONAL OPPORTUNITIES FOR PARTICIPATING SPONSORS

- Keynote Dinner—\$10,750/€7,500
- Cocktail Reception (two opportunities)—\$7,000/€5,000
- Luncheon (two opportunities)—\$3,500/€2,500
- Breakfast—\$3,500/€2,500
- Refreshment Breaks—\$3,500/€2,500

### DECEMBER

DECEMBER 4, CHELSEA PIERS, NEW YORK

#### **aiCIO Industry Innovation Awards**

TARGET AUDIENCE

150 delegates (25% asset owners, 25% advisers/consultants, 50% providers)

SPONSORSHIP PACKAGES

- Platinum—\$35,000
- Gold—\$20,000
- Silver—\$17,500
- Bronze—\$10,000
- Seats—\$1,200
- Dinner Program Advertisement—\$5,000

FOR GENERAL INFORMATION CONTACTS

MIKE GARITY, 617-670-4710 / mgarity@assetinternational.com

## Webcasts



PLANADVISER offers sponsored interactive events reaching our readers across the country on current industry topics. Webcasts can be used to complement existing marketing campaigns or to promote independently your company's expertise and thought leadership to an active and engaged audience during an informative and objective panel discussion.

### Details of Webcast Program

Hosted by PLANADVISER editorial. Sponsor executives included in panel discussion. Webcasts cannot exceed 60 minutes in duration.

### Call infrastructure managed by PLANADVISER but assumes the following vendor capabilities

- Web presentation will be performed using WebEx platform.
- Conference calling will be provided by AccuConference direct-dial capabilities

### Webcast recording

A Webcast recording will be accomplished via the WebEx standard/produced recording platform, which will allow participants who were not able to attend the original event to register and then view and listen to the presentation at a later date.

### Promotion of webcast

PLANADVISER is responsible for all promotion of Webcast events. PLANADVISER will promote actively all Webcasts to its various plan sponsor and related databases via the PLANSPONSOR NewsDash, PLANADVISERdash and direct e-mail invitations (additional e-mail blasts are at PLANADVISER's discretion). PLANADVISER will make best efforts to maximize Webcast attendance.

### Registration

The sponsor can include custom questions on the registration form and will be able to approve/deny all attendees.

### Following the event, the sponsor will be provided with an event report that includes:

- URL link to access the replay of the presentation
- List of enrolled participants, with contact information
- List of participants that attended, with contact information
- Questions submitted electronically by participants throughout the presentation

### Pricing

\$20,000\*

\* In the event of postponement occurring less than 60 days prior to webcast, liquidated damages in the amount of 30% of the contracted rate will be added to the final invoice. In the event of cancellation occurring 30-60 days prior to webcast, liquidated damages in the amount of 50% of the contracted rate will be due. In the event of cancellation occurring less than 30 days prior to webcast, liquidated damages in the amount of 100% of the contracted rate will be due. Webcasts that have more than 1,000 attendees will result in additional charges of \$15 per each additional attendee. However, the additional charges will be capped at \$3,000.



## Webcast 360

### Details of Webcast Program

Increase the return on your Webcast by closing the communication loop between thought leadership and your sales proposition. Webcast360 is a customizable e-mail follow-up tool that directly promotes your brand, expertise, and product advantages. Webcast360 is sent to your Webcast registrants at the conclusion of the Webcast and promotes follow-up materials as well as other company programs relative to the topic.

### Benefits of Webcast360

- Enhanced name recognition through Webcast360; original Webcast has greater longevity
- Webcast360 enables sponsor/client to highlight Webcast and introduce other company programs
- Highly qualified target base receives the e-mail, which provides detailed tracking results
- Tracking results provide qualified leads for sales team, critical for closing new business
- Webcast360 report provides an easy sales tool for sales team to use for follow-up by segmenting the qualified leads
- Webcast360 brand is much more effective than e-mails sent out directly by sponsor/ client

### Webcast360 includes

- Customizable e-mail follow-up tool sent out to registrants after the Webcast
- Report that includes the tracking results from the Webcast360
- Tracking results are segmented by link and provide contact information for each registrant who clicked on the correlating link

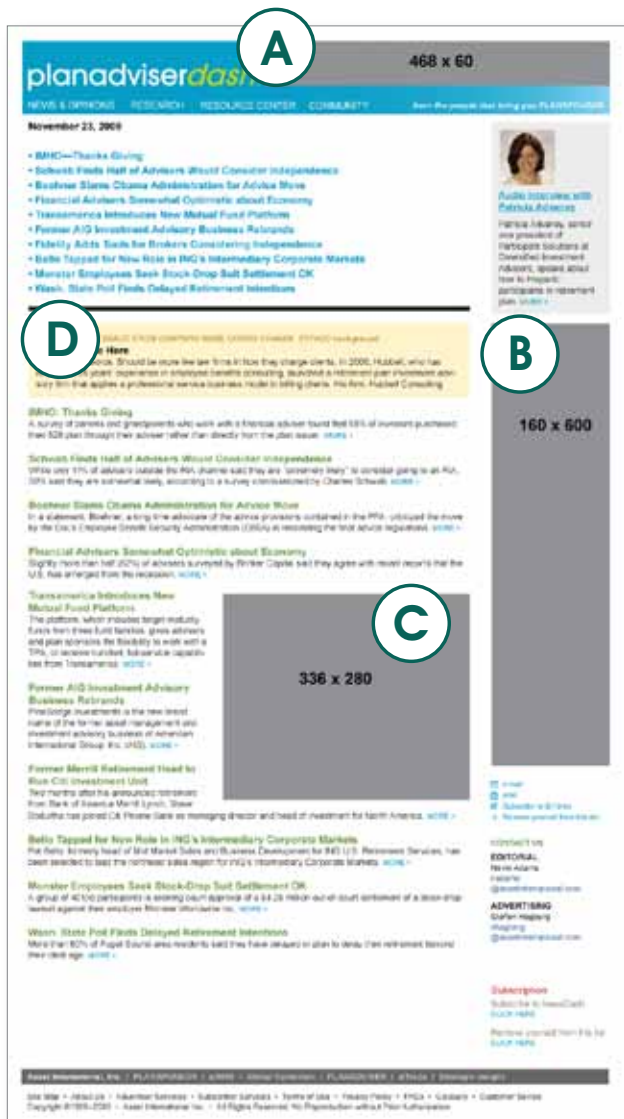
### Pricing

\$5,000 (in addition to Webcast costs)

Link	Views	Clicks	Open Rate	Click Rate
Webcast 360, The Standard				
subject: PLANSPONSOR Webcast 360: 403(b) Under the Microscope				
sent: Jun 8, 2009 9:00 am				
from: Mary McAuliffe <marycauliffe@assetinternational.com>				
to: The Standard Webcast360				
<b>Response Totals as of Jun 15, 2009 02:21pm</b>				
Total Emails Sent	759		50.9%	
Opens	378			44.9%
Clicks	172			
<b>Webcast Replay</b> ( <a href="http://planadviser-webex.com/planadviser.php?AT=rep&amp;P">http://planadviser-webex.com/planadviser.php?AT=rep&amp;P</a> )				
View Slide	33		4.3%	
GSA Answers	111		27.1%	
401(k) vs. 403(b) plan comparison PDF	100		24.4%	
How The Standard can help PDF	96		23.4%	
Standard.com	6		1.3%	
Plan Advisors	5		1.3%	
Plan Sponsors	5		1.3%	

Name	Email	Phone	Company
John Doe	john.doe@company.com	555-123-4567	ABC Corp
Jane Smith	jane.smith@company.com	555-987-6543	XYZ Inc
Bob Johnson	bob.johnson@company.com	555-234-5678	DEF LLC
Alice Brown	alice.brown@company.com	555-345-6789	GHI Corp
Charlie White	charlie.white@company.com	555-456-7890	JKL Inc
Diana Green	diana.green@company.com	555-567-8901	MNO LLC
Frank Black	frank.black@company.com	555-678-9012	PQR Corp
Grace King	grace.king@company.com	555-789-0123	STU Inc
Henry Lee	henry.lee@company.com	555-890-1234	VWX LLC
Ivy Hill	ivy.hill@company.com	555-901-2345	YZA Corp
Jack King	jack.king@company.com	555-012-3456	BCD Inc
Jill Queen	jill.queen@company.com	555-123-4567	EFG LLC
John Prince	john.prince@company.com	555-234-5678	HIJ Corp
Jane Rose	jane.rose@company.com	555-345-6789	KLM Inc
Bob Stone	bob.stone@company.com	555-456-7890	NOP LLC
Alice Taylor	alice.taylor@company.com	555-567-8901	QRS Corp
Charlie Vance	charlie.vance@company.com	555-678-9012	TUV Inc
Diana Ward	diana.ward@company.com	555-789-0123	WXY LLC
Frank Young	frank.young@company.com	555-890-1234	ZAB Corp
Grace Adams	grace.adams@company.com	555-901-2345	BCD Inc
Henry Baker	henry.baker@company.com	555-012-3456	EFG LLC
Ivy Clark	ivy.clark@company.com	555-123-4567	HIJ Corp
Jack Evans	jack.evans@company.com	555-234-5678	KLM Inc
Jill Fisher	jill.fisher@company.com	555-345-6789	NOP LLC
John Grant	john.grant@company.com	555-456-7890	QRS Corp
Jane Harris	jane.harris@company.com	555-567-8901	TUV Inc
Bob King	bob.king@company.com	555-678-9012	WXY LLC
Alice Lee	alice.lee@company.com	555-789-0123	ZAB Corp
Charlie Miller	charlie.miller@company.com	555-890-1234	BCD Inc
Diana Moore	diana.moore@company.com	555-901-2345	EFG LLC
Frank Nelson	frank.nelson@company.com	555-012-3456	HIJ Corp
Grace Olsen	grace.olsen@company.com	555-123-4567	KLM Inc
Henry Parker	henry.parker@company.com	555-234-5678	NOP LLC
Ivy Quinn	ivy.quinn@company.com	555-345-6789	QRS Corp
Jack Reed	jack.reed@company.com	555-456-7890	TUV Inc
Jill Scott	jill.scott@company.com	555-567-8901	WXY LLC
John Torres	john.torres@company.com	555-678-9012	ZAB Corp
Jane Walker	jane.walker@company.com	555-789-0123	BCD Inc
Bob Young	bob.young@company.com	555-890-1234	EFG LLC
Alice Ziegler	alice.ziegler@company.com	555-901-2345	HIJ Corp
Charlie Adams	charlie.adams@company.com	555-012-3456	KLM Inc
Diana Baker	diana.baker@company.com	555-123-4567	NOP LLC
Frank Clark	frank.clark@company.com	555-234-5678	QRS Corp
Grace Evans	grace.evans@company.com	555-345-6789	TUV Inc
Henry Fisher	henry.fisher@company.com	555-456-7890	WXY LLC
Ivy Grant	ivy.grant@company.com	555-567-8901	ZAB Corp
Jack Harris	jack.harris@company.com	555-678-9012	BCD Inc
Jill King	jill.king@company.com	555-789-0123	EFG LLC
John Lee	john.lee@company.com	555-890-1234	HIJ Corp
Jane Miller	jane.miller@company.com	555-901-2345	KLM Inc
Bob Moore	bob.moore@company.com	555-012-3456	NOP LLC
Alice Nelson	alice.nelson@company.com	555-123-4567	QRS Corp
Charlie Olsen	charlie.olsen@company.com	555-234-5678	TUV Inc
Diana Parker	diana.parker@company.com	555-345-6789	WXY LLC
Frank Quinn	frank.quinn@company.com	555-456-7890	ZAB Corp
Grace Reed	grace.reed@company.com	555-567-8901	BCD Inc
Henry Scott	henry.scott@company.com	555-678-9012	EFG LLC
Ivy Torres	ivy.torres@company.com	555-789-0123	HIJ Corp
Jack Walker	jack.walker@company.com	555-890-1234	KLM Inc
Jill Young	jill.young@company.com	555-901-2345	NOP LLC
John Ziegler	john.ziegler@company.com	555-012-3456	QRS Corp
Jane Adams	jane.adams@company.com	555-123-4567	TUV Inc
Bob Baker	bob.baker@company.com	555-234-5678	WXY LLC
Alice Clark	alice.clark@company.com	555-345-6789	ZAB Corp
Charlie Evans	charlie.evans@company.com	555-456-7890	BCD Inc
Diana Fisher	diana.fisher@company.com	555-567-8901	EFG LLC
Frank Grant	frank.grant@company.com	555-678-9012	HIJ Corp
Grace Harris	grace.harris@company.com	555-789-0123	KLM Inc
Henry King	henry.king@company.com	555-890-1234	NOP LLC
Ivy Lee	ivy.lee@company.com	555-901-2345	QRS Corp
Jack Miller	jack.miller@company.com	555-012-3456	TUV Inc
Jill Moore	jill.moore@company.com	555-123-4567	WXY LLC
John Nelson	john.nelson@company.com	555-234-5678	ZAB Corp
Jane Olsen	jane.olsen@company.com	555-345-6789	BCD Inc
Bob Parker	bob.parker@company.com	555-456-7890	EFG LLC
Alice Quinn	alice.quinn@company.com	555-567-8901	HIJ Corp
Charlie Reed	charlie.reed@company.com	555-678-9012	KLM Inc
Diana Scott	diana.scott@company.com	555-789-0123	NOP LLC
Frank Torres	frank.torres@company.com	555-890-1234	QRS Corp
Grace Walker	grace.walker@company.com	555-901-2345	TUV Inc
Henry Young	henry.young@company.com	555-012-3456	WXY LLC
Ivy Ziegler	ivy.ziegler@company.com	555-123-4567	ZAB Corp
Jack Adams	jack.adams@company.com	555-234-5678	BCD Inc
Jill Baker	jill.baker@company.com	555-345-6789	EFG LLC
John Clark	john.clark@company.com	555-456-7890	HIJ Corp
Jane Evans	jane.evans@company.com	555-567-8901	KLM Inc
Bob Fisher	bob.fisher@company.com	555-678-9012	NOP LLC
Alice Grant	alice.grant@company.com	555-789-0123	QRS Corp
Charlie Harris	charlie.harris@company.com	555-890-1234	TUV Inc
Diana King	diana.king@company.com	555-901-2345	WXY LLC
Frank Lee	frank.lee@company.com	555-012-3456	ZAB Corp
Grace Miller	grace.miller@company.com	555-123-4567	BCD Inc
Henry Moore	henry.moore@company.com	555-234-5678	EFG LLC
Ivy Nelson	ivy.nelson@company.com	555-345-6789	HIJ Corp
Jack Olsen	jack.olsen@company.com	555-456-7890	KLM Inc
Jill Parker	jill.parker@company.com	555-567-8901	NOP LLC
John Quinn	john.quinn@company.com	555-678-9012	QRS Corp
Jane Reed	jane.reed@company.com	555-789-0123	TUV Inc
Bob Scott	bob.scott@company.com	555-890-1234	WXY LLC
Alice Torres	alice.torres@company.com	555-901-2345	ZAB Corp
Charlie Walker	charlie.walker@company.com	555-012-3456	BCD Inc
Diana Young	diana.young@company.com	555-123-4567	EFG LLC
Frank Ziegler	frank.ziegler@company.com	555-234-5678	HIJ Corp
Grace Adams	grace.adams@company.com	555-345-6789	KLM Inc
Henry Baker	henry.baker@company.com	555-456-7890	NOP LLC
Ivy Clark	ivy.clark@company.com	555-567-8901	QRS Corp
Jack Evans	jack.evans@company.com	555-678-9012	TUV Inc
Jill Fisher	jill.fisher@company.com	555-789-0123	WXY LLC
John Grant	john.grant@company.com	555-890-1234	ZAB Corp
Jane Harris	jane.harris@company.com	555-901-2345	BCD Inc
Bob King	bob.king@company.com	555-012-3456	EFG LLC
Alice Lee	alice.lee@company.com	555-123-4567	HIJ Corp
Charlie Miller	charlie.miller@company.com	555-234-5678	KLM Inc
Diana Moore	diana.moore@company.com	555-345-6789	NOP LLC
Frank Nelson	frank.nelson@company.com	555-456-7890	QRS Corp
Grace Olsen	grace.olsen@company.com	555-567-8901	TUV Inc
Henry Parker	henry.parker@company.com	555-678-9012	WXY LLC
Ivy Quinn	ivy.quinn@company.com	555-789-0123	ZAB Corp
Jack Reed	jack.reed@company.com	555-890-1234	BCD Inc
Jill Scott	jill.scott@company.com	555-901-2345	EFG LLC
John Torres	john.torres@company.com	555-012-3456	HIJ Corp
Jane Walker	jane.walker@company.com	555-123-4567	KLM Inc
Bob Young	bob.young@company.com	555-234-5678	NOP LLC
Alice Ziegler	alice.ziegler@company.com	555-345-6789	QRS Corp
Charlie Adams	charlie.adams@company.com	555-456-7890	TUV Inc
Diana Baker	diana.baker@company.com	555-567-8901	WXY LLC
Frank Clark	frank.clark@company.com	555-678-9012	ZAB Corp
Grace Evans	grace.evans@company.com	555-789-0123	BCD Inc
Henry Fisher	henry.fisher@company.com	555-890-1234	EFG LLC
Ivy Grant	ivy.grant@company.com	555-901-2345	HIJ Corp
Jack Harris	jack.harris@company.com	555-012-3456	KLM Inc
Jill King	jill.king@company.com	555-123-4567	NOP LLC
John Lee	john.lee@company.com	555-234-5678	QRS Corp
Jane Miller	jane.miller@company.com	555-345-6789	TUV Inc
Bob Moore	bob.moore@company.com	555-456-7890	WXY LLC
Alice Nelson	alice.nelson@company.com	555-567-8901	ZAB Corp
Charlie Olsen	charlie.olsen@company.com	555-678-9012	BCD Inc
Diana Parker	diana.parker@company.com	555-789-0123	EFG LLC
Frank Quinn	frank.quinn@company.com	555-890-1234	HIJ Corp
Grace Reed	grace.reed@company.com	555-901-2345	KLM Inc
Henry Scott	henry.scott@company.com	555-012-3456	NOP LLC
Ivy Torres	ivy.torres@company.com	555-123-4567	QRS Corp
Jack Walker	jack.walker@company.com	555-234-5678	TUV Inc
Jill Young	jill.young@company.com	555-345-6789	WXY LLC
John Ziegler	john.ziegler@company.com	555-456-7890	ZAB Corp
Jane Adams	jane.adams@company.com	555-567-8901	BCD Inc
Bob Baker	bob.baker@company.com	555-678-9012	EFG LLC
Alice Clark	alice.clark@company.com	555-789-0123	HIJ Corp
Charlie Evans	charlie.evans@company.com	555-890-1234	KLM Inc
Diana Fisher	diana.fisher@company.com	555-901-2345	NOP LLC
Frank Grant	frank.grant@company.com	555-012-3456	QRS Corp
Grace Harris	grace.harris@company.com	555-123-4567	TUV Inc
Henry King	henry.king@company.com	555-234-5678	WXY LLC
Ivy Lee	ivy.lee@company.com	555-345-6789	ZAB Corp
Jack Miller	jack.miller@company.com	555-456-7890	BCD Inc
Jill Moore	jill.moore@company.com	555-567-8901	EFG LLC
John Nelson	john.nelson@company.com	555-678-9012	HIJ Corp
Jane Olsen	jane.olsen@company.com	555-789-0123	KLM Inc
Bob Parker	bob.parker@company.com	555-890-1234	NOP LLC
Alice Quinn	alice.quinn@company.com	555-901-2345	QRS Corp
Charlie Reed	charlie.reed@company.com	555-012-3456	TUV Inc
Diana Scott	diana.scott@company.com	555-123-4567	WXY LLC
Frank Torres	frank.torres@company.com	555-234-5678	ZAB Corp
Grace Walker	grace.walker@company.com	555-345-6789	BCD Inc
Henry Young	henry.young@company.com	555-456-7890	EFG LLC
Ivy Ziegler	ivy.ziegler@company.com	555-567-8901	HIJ Corp
Jack Adams	jack.adams@company.com	555-678-9012	KLM Inc
Jill Baker	jill.baker@company.com	555-789-0123	NOP LLC
John Clark	john.clark@company.com	555-890-1234	QRS Corp
Jane Evans	jane.evans@company.com	555-901-2345	TUV Inc
Bob Fisher	bob.fisher@company.com	555-012-3456	WXY LLC
Alice Grant	alice.grant@company.com	555-123-4567	ZAB Corp
Charlie Harris	charlie.harris@company.com	555-234-5678	BCD Inc
Diana King	diana.king@company.com	555-345-6789	EFG LLC
Frank Lee	frank.lee@company.com	555-456-7890	HIJ Corp
Grace Miller	grace.miller@company.com	555-567-8901	KLM Inc
Henry Moore	henry.moore@company.com	555-678-9012	NOP LLC
Ivy Nelson	ivy.nelson@company.com	555-789-0123	QRS Corp
Jack Olsen	jack.olsen@company.com	555-890-1234	TUV Inc
Jill Parker	jill.parker@company.com	555-901-2345	WXY LLC
John Quinn	john.quinn@company.com	555-012-3456	ZAB Corp
Jane Reed	jane.reed@company.com	555-123-4567	BCD Inc
Bob Scott	bob.scott@company.com	555-234-5678	EFG LLC
Alice Torres	alice.torres@company.com	555-345-6789	HIJ Corp
Charlie Walker	charlie.walker@company.com	555-456-7890	KLM Inc
Diana Young	diana.young@company.com	555-567-8901	NOP LLC
Frank Ziegler	frank.ziegler@company.com	555-678-9012	QRS Corp
Grace Adams	grace.adams@company.com	555-789-0123	TUV Inc
Henry Baker	henry.baker@company.com	555-890-1234	WXY LLC
Ivy Clark	ivy.clark@company.com	555-901-2345	ZAB Corp
Jack Evans	jack.evans@company.com	555-012-3456	BCD Inc
Jill Fisher	jill.fisher@company.com	555-123-4567	EFG LLC
John Grant	john.grant@company.com	555-234-5678	

## planadviserdash™



### Daily E-Mail Newsletter

PLANADVISERdash is the daily e-mail newsletter companion to PLANADVISER magazine and the PLANADVISER.com Web site, which address the specific needs and concerns of advisers who specialize in the sale and servicing of institutional retirement plans. PLANADVISERdash provides advisers with industry-relevant news, timely and topical coverage of expanding and deepening their practices, as well as the latest trends from our proprietary research.

The circulation of the newsletter has grown to more than 19,000 senior advisers, consultants, and service providers across the country. It has a design that complements the Web site and features five to seven original stories in each issue.

Published each workday morning, PLANADVISERdash focuses on ways to help the adviser succeed—leveraging the expertise and experience of the PLANSPONSOR franchise to provide the reader with practical and innovative adviser-centric solutions.

### File Sizes and Animation Specs

- Maximum file size is 39kb. Static JPG or static GIF only. There is no rich media on the newsletter.

### Material Deadline

- Creative must be received three business days prior to the campaign drop.
- Creative e-mailed directly to shagberg@assetinternational.com.
- Linking URL for ad to be supplied.
- URL must be in the format "http://" not "www."

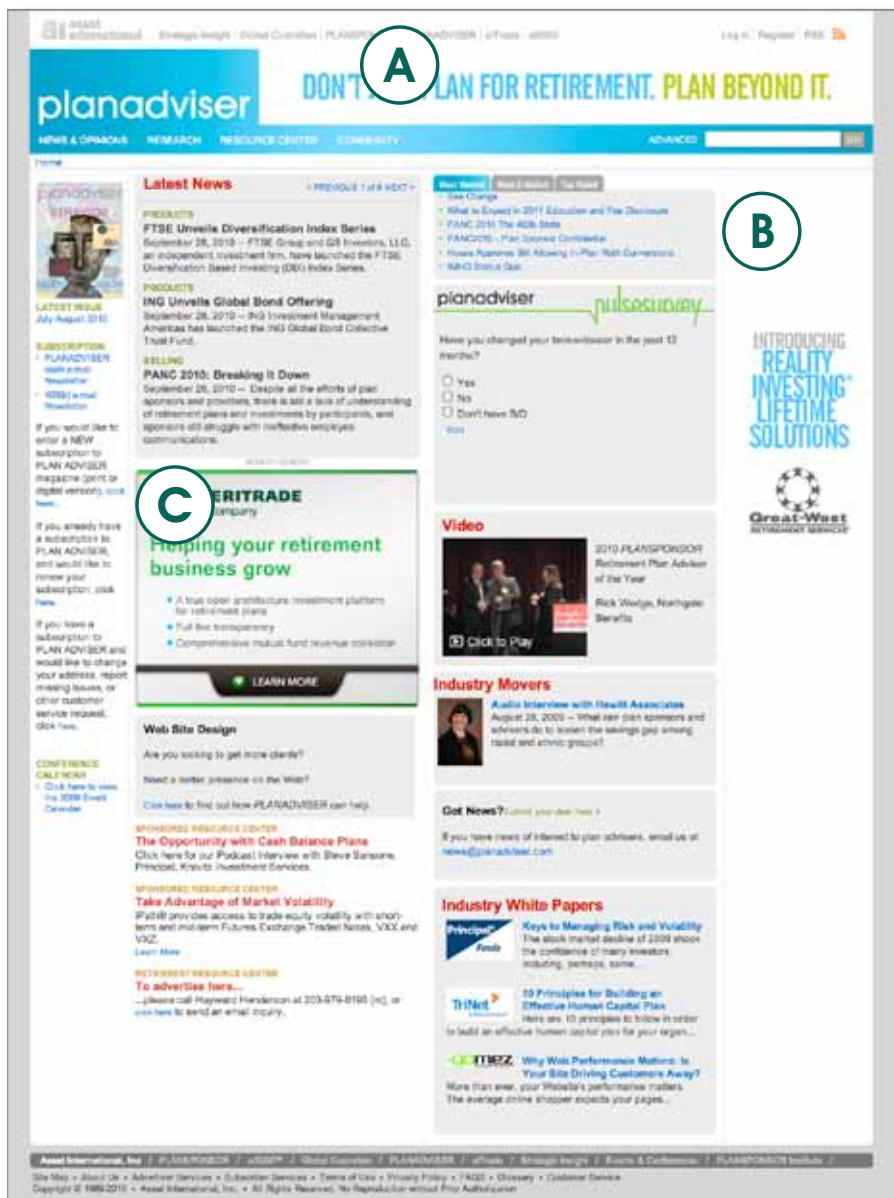
### 2012 PLANADVISERdash E-mail Newsletter Advertising Rate Card

<b>A Top Banner Ad (468 x 60)**</b>	\$825
<b>B Skyscraper Ad (160 x 600)**</b>	\$825
<b>C Island Ad (336 x 280)**</b>	\$825
<b>D Text Link Ad*</b>	\$825

\*Header - one line, up to 70 characters.  
 Body - 3 lines, up to 85 characters per line  
 URL - must be in format "http://" not "www."

\*\* Must supply text along with each ad. Up to 3 lines of text with 65 characters per line.

### Web Site



### Site Usage - Latest Month

- Unique Visitors 16,000\*
  - Number of Impressions 700,000\*
- \*Source: Dart Advertising System

### Advertising:

\$90/CPM open rate

### File Sizes and Animation Specs

- Ⓐ Top Leaderboard (728x90)
- Ⓑ Skyscraper (160x600)
- Ⓒ Island (336x280)

### File Sizes and Animation Specs

- 39k max file size
- Three loops—animation must cease after seven seconds

### HTML

- No <span style> tags
- Without JavaScript preferred

### JavaScript and JAVA

Accepted on a case-by-case basis

### Rich Media

PLANADVISER.com accepts only HTML including JavaScript, Java Applets, Shockwave, streaming video, etc.

### Standard Files

GIF & JPEG graphics to meet above file size criteria

### FLASH

The movie must stop animating after seven seconds. Please supply the following:

- .fla — FLASH movie file.
- .swf — compressed version of .fla
- .gif — alternate GIF image to be served to non-capable browsers
- URL — the linking URL for the ad

The following code MUST be the first layer on every scene of the movie:

```
on (release) {
  getURL (clickTag, "_ blank");
}
```

### Materials

Asset International Inc.  
 Attn: Steve Hagberg  
 203-595-3284  
 shagberg@assetinternational.com

## Video Interview

### Features

The five-minute interview will feature the following questions:

- Can you provide an overview of your firm?
- What are some of the key themes you are hearing from advisers today?
- How is your firm helping advisers with their challenges?
- How does your firm differentiate itself in today's marketplace?
- How do you see the retirement landscape evolving over the next few years?

### Benefits

- PLANADVISER covers all production, hosting, and posting-related expenses
- Cross-promotion on our site and e-newsletters
- Hosted on PLANSPONSOR.com for 90 days (client owns video after 90 days)
- Can be linked and tracked with any outside Web site
- QuickTime/Windows Media File to be provided at no additional fee

### PLANADVISER.com Promotion

First 30 days includes frequent promotion on homepage

### PLANADVISERdash Promotion

First 30 days includes promotion within NewsDash

Videos can be recorded at the following conferences:

#### PLANSPONSOR National Conference

June 4-6, 2012

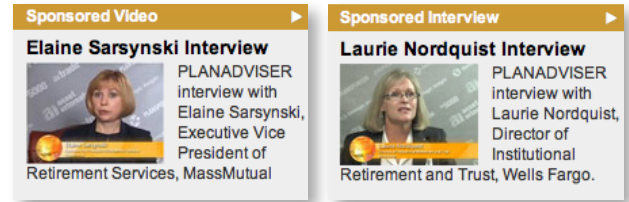
The Fairmont Hotel, Chicago, IL

#### PLANADVISER National Conference

September 10-12, 2012

JW Marriott, Grande Lakes, Orlando, Florida

Investment: **\$8,500 net**



Home page-rotator box



Hosted in multi-media tab of PLANADVISER.com



Daily rotation on PLANADVISER.com

### Co-Sponsored Research

Teaming with *PLANADVISER* to create co-sponsored research is a way to demonstrate thought leadership and 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:

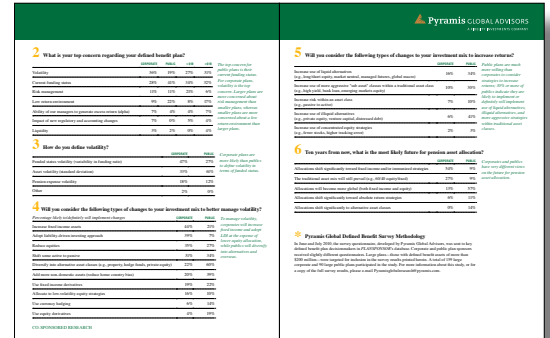
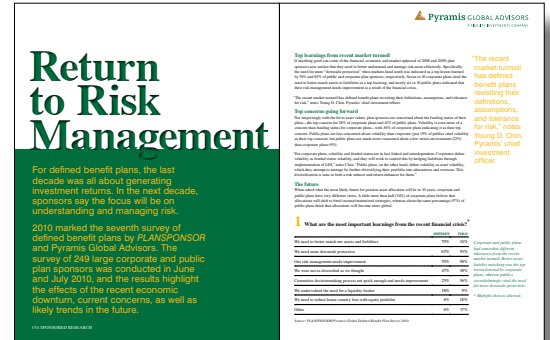
- Questionnaire development (20-30 questions)
- Selection of targeted names from the *PLANADVISER* database of retirement plans, advisers, or providers (selectable by plan type, assets, geography, and title)
- Programming of questionnaire for online response
- Solicitation and collation of responses (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 *PLANADVISERdash*, with a link to the piece

#### Specifications

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

#### Cost

\$70,000 – \$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 7,000 employers

### **PLANSPONSOR Industry Reports in a nutshell**

- 50+ pages in pdf format
- cover DC plans in 49 different industries
- compare client plans to others in the same industry and asset class, and overall
- available with your firm's branding or logo on every page
- distributable to sales staff or adviser network; post on your client site behind registration

### **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

Availability: Late October, 2011

### **Industries covered:**

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

## 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

### Pricing

---

- |  |         |
|--|---------|
| • Micro Market (<\$5MM in plan assets) | \$5,500 |
| • Small Market (\$5MM–\$50MM)          | \$5,500 |
| • Mid Market (>\$50MM–\$200MM)         | \$5,500 |
| • Large Market (\$200MM–\$1 billion)   | \$5,500 |
| • Mega Market (>\$1 billion)           | \$5,500 |

Quantity discounts apply.

### Contact

---

Brian O'Keefe  
203-979-3091  
bokeefe@assetinternational.com

### Reprints

Reprints are an effective way of highlighting what is being said about your firm around the institutional retirement industry.

Reprints are reproductions of articles, text, quotes, or numerical data from PLANSPONSOR and PLANADVISER and editorial or surveys. They set apart and magnify critical information about your firm or product in a form sure to get the reader's attention.

#### Advantages

- Prominent: *PLANSPONSOR* and *PLANADVISER* reprints are eye-catching, easy to read, and provide an objective view of your product or service.
- Focused: Isolates and amplifies the information that providers most want readers to see.
- Custom: Select the text or data and choose the format that best suits your firm or product.
- Efficient: Reprints deliver a message directly and with impact in a cost-effective manner.
- Effective: Leave-behinds help strengthen brand awareness.

#### Specifications

- Reprints can be up to 32 pages in length.
- Black and white or color.
- Editing and design services available.
- Available in orders of 100–1,000,000.
- Allow two weeks for delivery.
- Customized electronic reports (pdf files) also available for e-mailing or posting to a Web site.

#### Contact

Michelle Judkins  
mjudkins@assetinternational.com  
203-595-3276



## List of Advertisers

ADP Retirement Services

Alliance Bernstein

American Century

AXA Distributors

Bank of America Merrill Lynch

Blackrock

BNY Mellon

Charles Schwab

Columbia Management Group

Commonwealth Financial

CPI Qualified Plans

CUNA Mutual

Diversified Investment Advisors

DWS Investments

Eaton Vance

ExpertPlan

Fidelity Investments

Franklin Templeton

Goldman Sachs Asset Management

Great West Retirement Services

ING Institutional Plan Services

Ivy Funds

J.P. Morgan Asset Management

John Hancock Retirement Services

Legg Mason

Lincoln Financial

LPL Financial

M&I Investment Corporation

MassMutual

MetLife

Nationwide Financial

Natixis Global Associates

Newberger Berman

Nuveen

OneAmerica

Oppenheimer Funds

Pacific Life

Payden & Rygel

Principal Financial Group

Prudential Retirement Services

Putnam

Russell Investments

Securian

Sentinel Financial Services

Standard Insurance

T. Rowe Price Retirement Plan Services

TD Ameritrade

The Hartford Life

The Newport Group

Tiaa-Cref

Transamerica Retirement Services

UBS Wealth management

Unified Trust

Well Fargo Institutional Trust Services