

# Integrated Marketing Services

## 2020 MEDIA KIT



**informa**



# Why WealthManagement.com is the only media partner you need to win over financial professionals

## Our audience

100% penetration of the financial advisory and wealth planning communities

## Our mission

Provide news, insight and analysis on the trends shaping the wealth management industry. WealthManagement.com is a place for all wealth managers to understand how the industry is evolving and why, and help them discern the tools and resources needed to navigate their professional lives, build better businesses and create better outcomes for their clients.

## Our unique benefits for marketers

- Extensive profiles from a community of *more than 350,000 advisors we talk to on a daily basis*
- Experts in customization and targeting
- Proven marketing solutions with measurable ROI
- Comprehensive digital platforms delivering information to advisors when, where and how they want to receive it — resulting in a highly engaged audience



- 1.8 million+ monthly page views on WealthManagement.com — and growing
- 550,000+ unique monthly visitors
- Time spent per unique visitor: 6.3 minutes
- 435,000+ active email addresses
- 765,000+ active e-newsletter subscribers
- 4.8 million ad impressions per month
- Device traffic: desktop 55%, mobile/tablet 45%



## A day in the life of an advisor

# 69% of their day

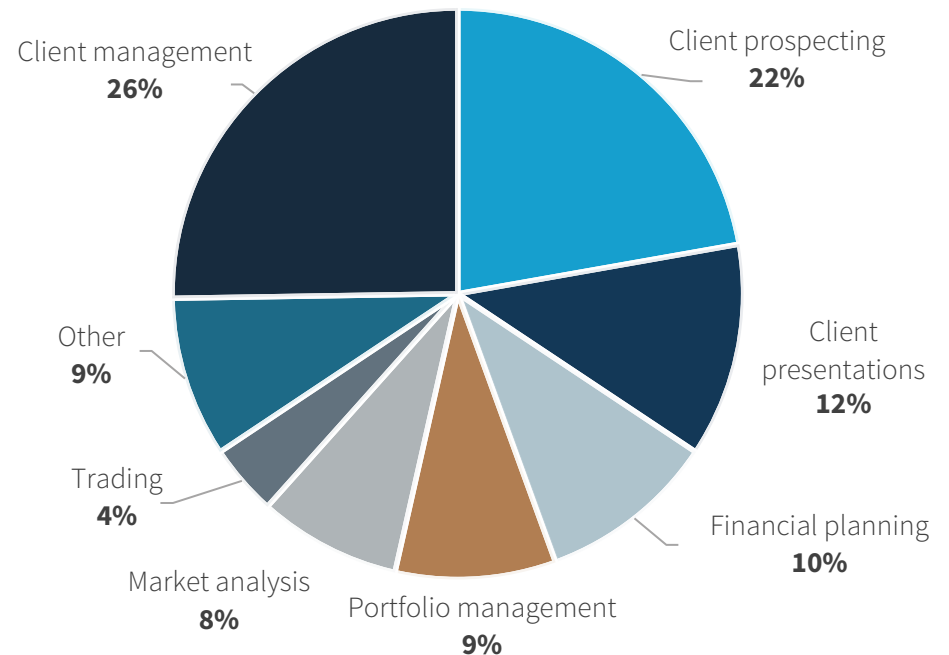
**is spent on client managing, prospecting and presenting**

Financial advisors turn to WealthManagement.com to grow and improve their practice and make their clients successful.

They depend on our content for:

**WEALTH PLANNING**  
**PRACTICE MANAGEMENT**  
**INVESTMENT**  
**NEWS**  
**OPINIONS**  
**RESEARCH & TOOLS**

### TIME SPENT BY ACTIVITY



Source: WealthManagement.com prospecting survey



# Providing access to 100% of the financial advisory and wealth planning community

Exclusive insights and analyses that help advisors manage their practice and grow their business

## EDITORIAL CONTENT

News analysis  
Investment ideas  
Wealth planning strategies  
Practice management tips  
Real estate strategies  
Latest tech tools  
Research and resources

## PRINCIPAL AUDIENCES SERVED

### Financial Advisory Channels

Independent B/Ds	76,395
RIAs	100,552
Wirehouses and regionals	76,657
Banks	41,017
Insurance firms	20,570
Institutional	18,025
Other	18,121
<b>TOTAL</b>	<b>351,337</b>

### Wealth Planning Channels

Estate planners/attorneys	26,000
Family offices	2,300
CPAs/accountants	13,800
Banks/trusts	6,900
Product distribution	9,770
Other	10,500
<b>TOTAL</b>	<b>69,270</b>

## PRODUCTS & SERVICES

- Online advertising
- Magazine advertising
- White papers
- Research
- Newsletters
- Email services
- eBook sponsorships
- Videos
- Events
- Custom marketing

## MARKETING SOLUTIONS

- Brand awareness
- Education/thought leadership
- Lead Gen/lead nurturing
- Custom content
- Web traffic development
- High Impact programs







# Additional access to these related wealth management professionals

## RETIREMENT PLAN ADVISORS

Audience: 61,187

### Retirement Plan Assets Under Management

More than \$1 Billion	8%
\$500 Million - 1 Billion	6%
250 - 500 Million	14%
100 - 249 Million	16%
50 - 99 Million	20%
10 - 49 Million	19%
Less than 10 Million	17%

### Plan Types

401(k)	36%
403(k)	25%
457	19%
Defined Benefit	21%

## INSTITUTIONAL CONSULTANTS

Audience: 17,191

**Firms include:** Mercer, AON Hewitt, Willis Towers, Watson, Pension Consulting Alliance, Callan Associates, Wilshire, Milliman, Pension Consulting Alliance, CAPTRUST, Bellwether Consulting

### Number of Employees:

1,000 to 10,000+

### Firm Revenue:

\$500,000 to \$500,000,000+

## RETIREMENT PLAN SPONSORS

Audience: 16,098

### Titles include:

- Executive Management
- Financial Management
- Employee Benefits
- Pensions
- HR
- Legal

### Number of Employees:

1,000 to 10,000+

### Firm Revenue:

\$500,000 to \$500,000,000+



## Marketing solutions designed around your specific goals and objectives

	Brand Awareness	Website Traffic	Lead Generation	Drip Marketing/ Lead Nurturing	Education/ Thought Leadership	Content Development	Content Distribution	High Impact	Program Launch
Website Banners (desktop/mobile)	✓	✓						✓	✓
Website Channel Sponsorships	✓	✓							✓
Native Advertising	✓	✓			✓	✓	✓		
Audience Extension (Account Based Marketing)	✓	✓							✓
Podcasting and Podcast Sponsorships	✓	✓							
Industry Research Sponsorships	✓	✓	✓		✓			✓	
Print Advertising	✓							✓	✓
Webinars	✓		✓		✓	✓	✓	✓	
Podcasting and Podcast Sponsorship	✓				✓		✓	✓	
Custom E-mail Blasts		✓	✓	✓	✓		✓		✓
E-newsletters	✓	✓							✓
Guaranteed Lead Programs			✓		✓		✓		
Lead Nurturing			✓	✓	✓		✓		
White Papers			✓	✓	✓	✓	✓		
eBooks			✓	✓	✓	✓	✓	✓	
Custom Research	✓				✓	✓			
Infographics					✓	✓	✓	✓	
Videos					✓	✓	✓		



# Maximize cost efficiency and reach with audience customization and targeting

Your marketing efforts can be aimed at specific advisor demographics, business profiles and behaviors

## COMMONLY REQUESTED SELECTION CRITERIA INCLUDE:

- Firm channel
- Firm name
- Licenses/designations held
- Assets under management
- Gross annual production
- Advisory services
- Primary method of compensation
  - Fee-only
  - Commission-only
  - Fee plus commission/hybrid
- Years of industry experience
- Products recommend/sell
- Type of group retirement plans
- AUM
- Geography/region
- Age
- Gender
- Investment strategy
- Accounts at firm





# How we advance the way wealth managers connect with your business

## ADVERTISING



Reach your target audiences in environments they trust

## RESEARCH



Discover what's on the minds of your target audiences

## CONTENT MARKETING



Keep your brand top of mind while you educate and inform

## LEAD SERVICES



Nurture relationships with prospects that matter most

## EVENTS



Make connections that matter

# ADVERTISING

- Website ROS
- Interstitials
- Content channels
- Embedded video
- Native content
- Audience extension
- Programmatic
- Social media
- Targeted newsletters
- Magazines



informa





# WealthManagement.com website

Reach the largest audience of financial advisors available on the website they trust most

Advisors connect with your brand at various stages of the buying cycle; so it's vital to give them opportunities to engage with your brand across multiple channels and devices. Our website digital advertising solutions are a great way to increase brand awareness, improve brand recall, drive traffic to your websites and build relationships with prospects as they research new product and solution purchases.

## DETAILS

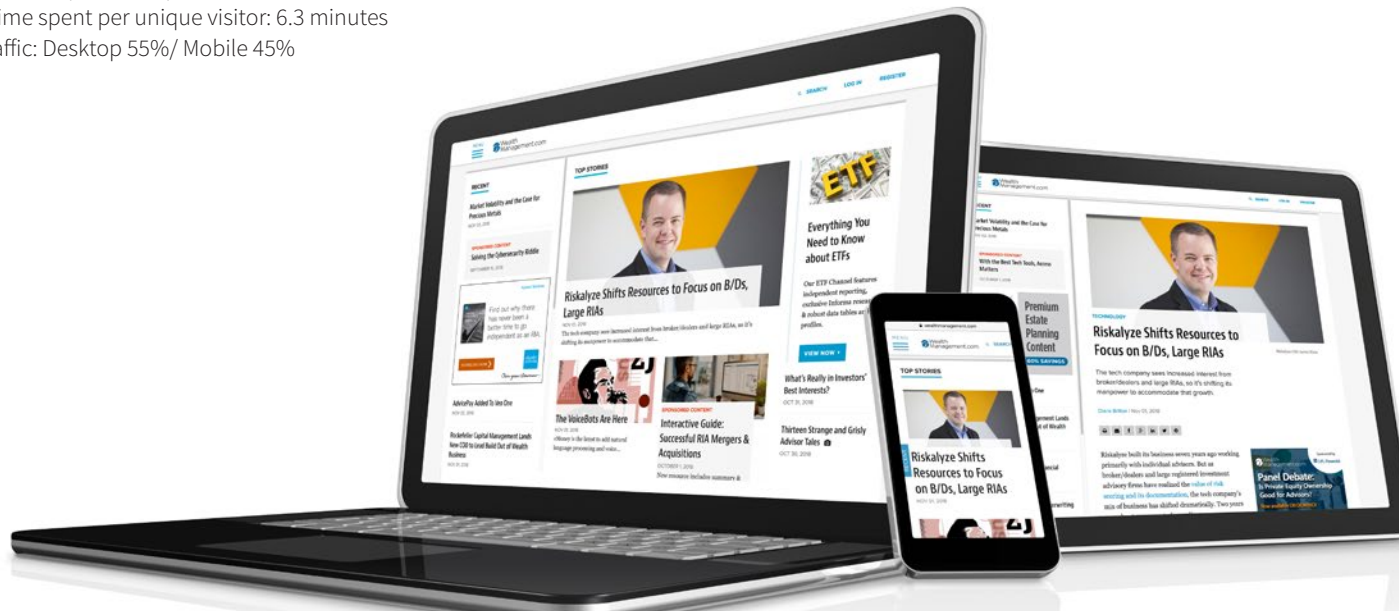
- 1,800,000 page views per month
- 550,000 unique monthly visitors
- 4.8 million ad impressions per month
- Average time spent per unique visitor: 6.3 minutes
- Device traffic: Desktop 55%/ Mobile 45%

## STANDARD AD UNITS

- 970x250
- 728x90 top leaderboard
- 728x90 interscroller
- 300x250 left (pinned unit)
- 300x250 right
- 300x600 right column
- 320x50 smartphone leaderboard

## HIGH-IMPACT AD UNITS

- 640x480 interstitial
- 970x40 locked floor ad
- In-article video
- Expandable units: In-article expander, mobile





# Interstitials

## DETAILS

- Welcome ads that appear when visitors first visit the site
- Advertisers receive 25% to 100% SOV
- Average impressions: 72,000 per week (estimated, not guaranteed)



**Outsmart future long-term care costs.**

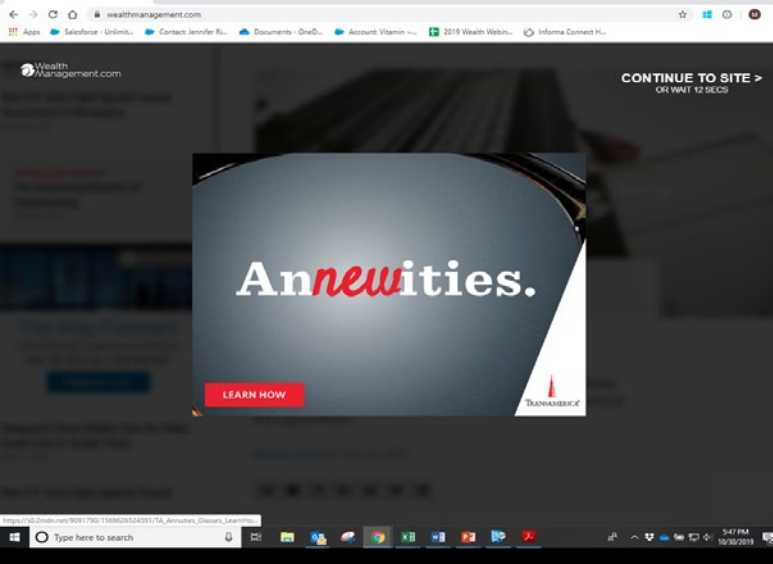
Introducing Brighthouse SmartCare®, a hybrid life insurance and long-term care product.

 **Brighthouse**  
FINANCIAL®  
Build for what's ahead™

[Learn More](#)

ICC18-BHFDA-1  
5-18-BHFDA-1

Brighthouse Life Insurance Company



wealthmanagement.com

CONTINUE TO SITE >  
OR WAIT 12 SECS

**Annewities.**

[LEARN HOW](#)

ANNEWITIES



# In-article video ad

High impact video marketing  
embedded in editorial articles

Place video directly within editorial article layout to put your message in front of advisors in a highly effective and user-friendly way.

## OVERVIEW

- Plays when visible on user's screen, pauses when user can't see it onscreen; resumes when in view again
- Audio starts on mouse rollover
- Video disappears from body of article once played to completion, making it less intrusive to the user's experience
- Premium environment for short 30-60 second videos — below the fold between two paragraphs for more focused, attentive viewer engagement
- Guaranteed viewability — only plays when more than 50% in view on user's screen

The screenshot shows the Wealth Management.com website. The main article is titled "Investors Are Not Waiting Three Years With ETFs" by Todd Rosenbluth, dated April 19, 2019. The article discusses the growth of ETFs and mentions that CFRA rates more than 400 equity and fixed income ETFs that launched after April 2016. A sidebar on the left lists recent and featured articles. A video ad for JPMorgan Ultra-Short Income ETF (JPST) is embedded in the article, showing a stack of boxes and a red arrow pointing to it with the text "Video Ad".

**RECENT**

- Combat Complacency with One Social Lunch a Week  
NOV 21, 2019
- SPONSORED CONTENT**  
Get the Latest Take on Trusts  
OCT 10, 2019
- Outsmart future long-term care costs. Introducing BrightHouse SmartCare®, a hybrid life insurance and long-term care product.  
BrightHouse Life Insurance Company  
OCT 18, 2019
- False Choice in Portfolio Construction and the Advisory Solution of the Future  
NOV 26, 2019
- Michael Kitces' #FASuccess Podcast: How Luna Jaffe Expanded Her Practice with Pie  
NOV 26, 2019
- Salesforce Reveals Plans for Voice-in-Business  
NOV 16, 2019
- Atria B/Ds Hire New Director of Business Development  
NOV 16, 2019

**FEATURED**

- The Top Colleges for Financial Planning  
OCT 09, 2019
- The 10 Most and 10 Least Valuable College Majors  
AUG 28, 2019
- The Top 25 Countries for Retirement Security  
SEP 25, 2019
- Vanguard Pilots New Robo Offering  
SEP 16, 2019

**INVESTMENT > ETFs**

## Investors Are Not Waiting Three Years With ETFs

Here's a breakdown of the top ETFs with more than \$1 billion in market capitalization and a track record of less than three years.

Todd Rosenbluth | Apr 19, 2019

New ETFs keep launching on a weekly basis, and not long after CFRA establishes a quantitative forward-looking rating. While some others in the industry wait for a three-year anniversary, we understand there's demand to learn about new products early in their lifecycle. Indeed, there are nine ETFs that began trading in the past three years, rated by CFRA and that have a market capitalization greater than \$1 billion. Many more could hit that mark before they are rated elsewhere.

CFRA rates more than 400 equity and fixed income ETFs that launched after April 2016 (27% of our 1,467 rated fund universe as of April 16), using a combination of qualitative and quantitative holdings-level analysis and fund attributes focused on costs, liquidity and technical analysis. Rated coverage typically begins within three months of an ETF's history, and as of April 16 we rated 11 ETFs that launched in 2019.

These include **BlackRock US Equity Factor Rotation (DYNF)** and **Fidelity Small-Mid Factor ETF (FSMD)** that still have limited assets. While DYNF and FSMD remain small in size, many other still young ETFs have successfully tapped into a compelling theme, while others gained traction due to their low costs.

**Ultra-Short-Term Fixed Income**

Although the Federal Reserve has likely paused its rate-hiking program, in 2018, there were significant concerns about the impact of rising interest rates. Ultra-short-term bond ETFs, both young and old, raked in cash as downside protection was in vogue.

**Video Ad**

**JPMorgan Ultra-Short Income ETF (JPST)** launched in May 2017, but gathered \$5 billion in 2018 and an additional \$1.5 billion this year to reach a \$6.6 billion market capitalization. The ETF sports a 2.9% 30-day SEC yield, despite incurring an average duration of just 0.3 years. The portfolio holds mostly investment-grade corporate bonds, but also includes asset-backed securities and a modest Treasuries stake. Further helping CFRA's rating is the modest 0.18% net expense ratio.

**Leverage this fund story with your clients**  
[READ MORE >](#)

ETFs by JPMorgan Asset Management



# Custom content channel

Leverage your thought leadership content with an exclusive online channel reaching up to 435,000 wealth management professionals

WealthManagement.com custom content channels can deliver your great content for advisors — in an exclusive, competitor-free environment — to the exact audiences you're trying to reach to achieve your specific marketing goals and objectives. [See online content channel](#)

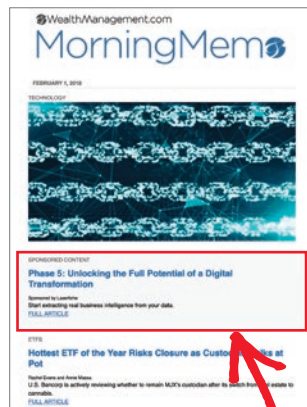
## DETAILS

- A** 100% exclusivity for all standard digital display positions
- B** Exclusive, competitor-free environment
- C** If you supply 100% of the content, there's no need to label each content piece as "sponsored." But if you'd prefer, you can mingle your content with our editorial content
- D** Custom header and color schemes to match your branding
- E** Include links to information on your website
- F** Embed your social media feeds
- G** Compliance language included at foot of the page (optional)

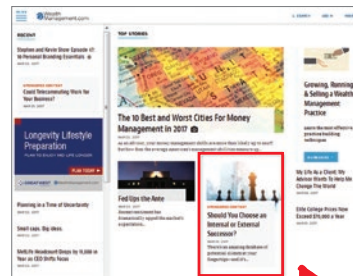
## Marketing Deliverables



Custom newsletter sent to 25k+ individuals matching your target



Morning Memo/Daily Memo sponsored content promotions

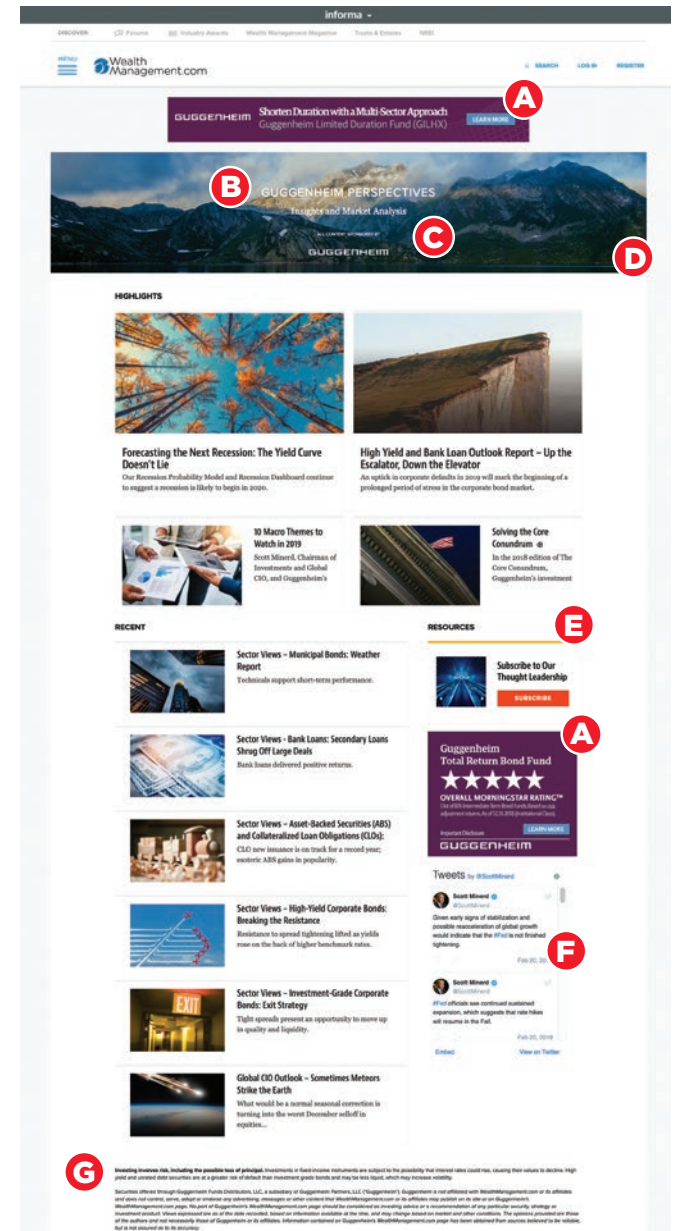


Run-of-site native ads pointing to sponsor-provided content



Social media posts

## Custom Content Channel Example



Note: Guggenheim is not promoting the use of or recommending WealthManagement.com





## Audience extension: Web

Extend your reach and stay in front of your most valuable prospects with audience-based targeting

Audience extension campaigns target the wealth managers in our database who match your target criteria. Utilizing trusted business and financial sites, your campaign is displayed multiple times, only to those that fit your targeted profile.

### DETAILS

- Banners or native text placements across web, powered by WealthManagement.com
- Targeting options include: demographic, firmographic and behavioral data
- Account-based programs available



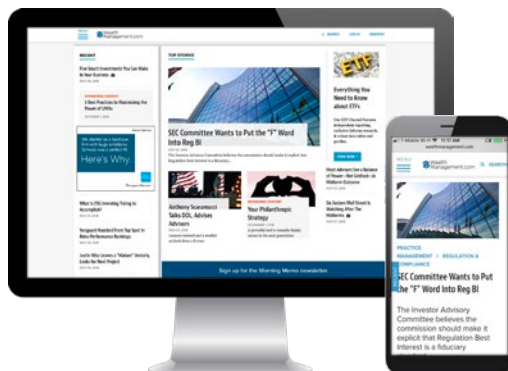
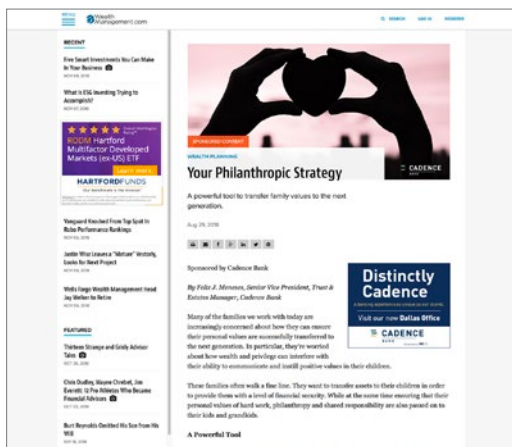




# Audience extension: In-feed native ads

Drive advisors to your rich content. Simple. Smart. Effective.

You've made the investment to create high-value content. But, are you getting that content in front of the right advisors? In-Feed Native Ads do just that by placing a compelling headline, image and link back to your content seamlessly into a site's content flow. Native ads on WealthManagement.com can also be placed across the web or on social platforms, where first-party data powers your campaign to help target prospects with precision.



- 3x higher retention rates than banners
- 20-60% higher engagement than banners

## Brand In-Feed Native Ads

In-Feed Native Ads integrate seamlessly within our high-value editorial environments via ROS in-feed spots. More than ever, users are turning to trusted brands for news and information. A perfect way to get your rich content placed in front of financial advisors.

## Network AX In-Feed Native Ads

It's all about audience and targeting. Using the power of WealthManagement.com's first-party data, you can target In-Feed Native Ads to your selected audience across the web. A perfect way to reach prospects multiple times per week.



## Social AX In-Feed Native Ads

Put the social giants to work for you. Your content promoted directly in-feed on Facebook and/or LinkedIn, powered by WealthManagement.com's first-party data. You pick the target segment and that's who will receive your content post in their feed. Premium location, large image or video, engagement options, social sharing, and more.



# Audience extension: Social media

Audience-based targeting on LinkedIn or Facebook

The collage illustrates audience extension through social media. It features a LinkedIn profile for David Sickles, a sponsored post for Syracuse Online Business, a LinkedIn ad for 'Use LinkedIn ads to separate from the competition', a Facebook post for WealthManagement.com with Brighthouse Financial, and a list of recommended topics and people on LinkedIn.

**LinkedIn Profile: David Sickles**  
Digital Product Development Manager at Penton  
27 Who's viewed your profile  
261 Connections  
Grow your network  
Access exclusive tools & insights  
Try Premium for free

**Sponsored Post: Syracuse Online Business**  
Promoted  
GMAT on your mind? Syracuse's online MBA offers waivers to qualified professionals. Learn more today!  
24 Months - Top-10 Online MBA - GMAT Waivers  
15 Likes  
Like Comment Share

**LinkedIn Ad: Use LinkedIn ads to separate from the competition**  
Start off with \$50 in free ad credits  
Request \$50 credit

**Facebook Post: WealthManagement.com with Brighthouse Financial**  
Sponsored  
What does the retirement portfolio of the future look like? Find out on Nov. 9th at 4pm EST  
Webinar Hosted by Brighthouse Financial  
It's free to attend and you will receive a code redeemable for one Continuing Education course worth up to 15 hours of CE.  
BRIGHTHOUSEFINANCIALPRO.COM  
Sign Up  
4 Likes  
Like Comment Share

**LinkedIn Recommendations:**  
Add to your feed  
Outdoor Advertising Topic  
Manu Kumar Jain Vice President, Xiaomi and Managing Direct...  
Simon Sinek Optimist and Founder at Start With Why  
View all recommendations

**Footer:**  
About Help Center Privacy & Terms  
Advertising Business Services  
Get the LinkedIn app More



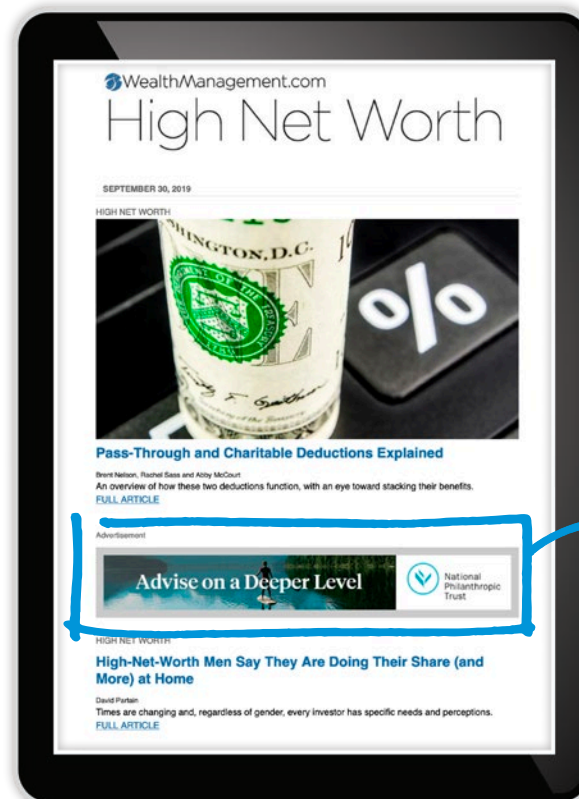
# Enewsletters

Surround your message with content targeted to your thought leadership positioning

E-newsletter	Frequency	Circulation	Open Rates
Morning Memo	Daily	173,837	35%
Daily Memo	Daily	140,651	32%
Investment Strategies	Weekly	69,020	41%
Estate Planner	Weekly	56,642	49%
High Net Worth	Weekly	104,415	22%
Practice Management	Weekly	69,770	40%
ETF Strategies	Weekly	61,411	29%
Retirement Plan Advisor	Bi-monthly	32,250	28%
FinTech	Weekly	62,761	27%

## DETAILS

- 100% opt-in readership
- High open rates = highly engaged audience
- Specific newsletters for content alignment



**AD UNITS**  
580x80 or  
580x327



# Special Conference Coverage

## Inside ETFs, Schwab, Morningstar or any major event

Our editors go on the road to cover all the major advisor conferences throughout the year. Our coverage garnered more than 30,000 page views over the course of just a few days. Several options to consider...

### DETAILS

- **High SOV Ads**
- **Wealth Management E-letter** devoted to coverage of the conference. The e-letter has 100,000+ subscribers.
- **Email promotions** to 30,000 advisors of your choice
- **Sponsored posts:** We post two articles (or videos, or infographics), into the editorial “stream” of the conference coverage
- **Video Interviews and podcasts Q&A from conference floor**



# Newsletter sponsored native posts

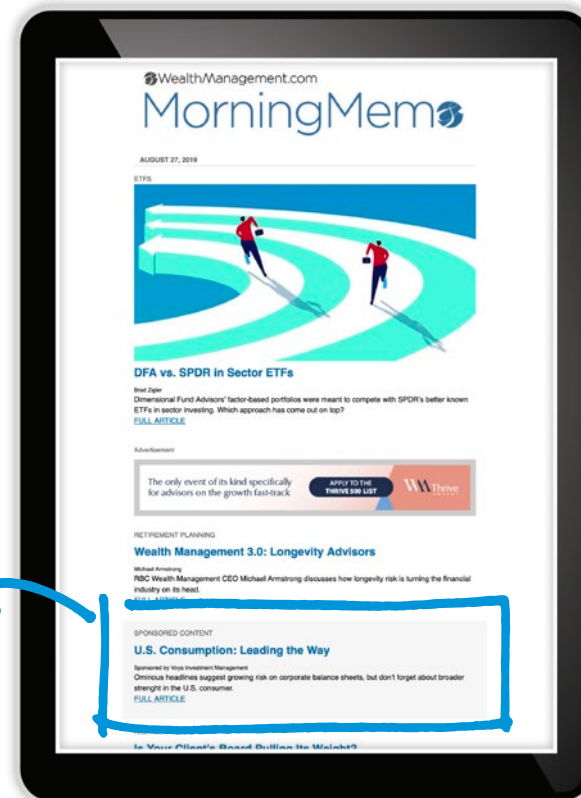
Promote sponsored content within daily newsletter editorial posts

Drives traffic to educational content on your site or sponsored content on WealthManagement.com

## NEWSLETTERS

- Opt-in subscriber circulation
- 174,000 circulation on Morning Memo and Daily Memo
- Average open rate is 33%
- Average CTR .17%

Sponsored content







# Wealth Management

The magazine of WealthManagement.com

- Providing advisors with unbiased insights on trends, regulatory concerns, practice management and investment advice designed to help them build and grow successful practices
- Circulation: 174,000 print and digital
- Frequency: 12x in 2020

Industry	Circulation
Wirehouse and Regional	53,162
RIA	14,856
Independent B/D	41,065
Bank/Insurance	40,801
Other	23,953
<b>TOTAL</b>	<b>173,837</b>

## THE ONLY INDUSTRY MAGAZINE THAT PROVIDES MARKETERS WITH MEASURABLE ROI FOR EVERY AD THEY RUN

Wealth Management magazine conducts Ad Recall Studies in every issue. Advertisers also have the opportunity to submit proprietary custom questions of their own as part of our research. Open to all page or more advertisers who run a minimum of 3 magazine ads in 2020.





# Annual Midyear and Yearend Special Issues

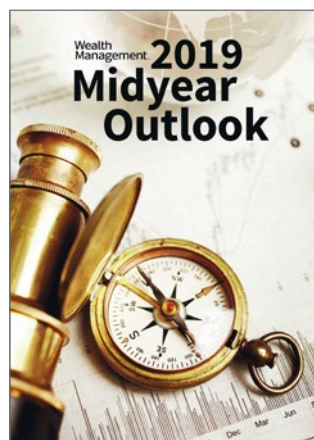
## A powerful thought leadership opportunity for marketers and PR professionals

Twice a year, the editors of *Wealth Management* magazine publish special editions designed to help advisors navigate through the torrent of economic and market outlooks from asset managers by selecting the best of the best.

These issues are made up of firm-submitted content — and for a small administrative fee, your firm can contribute.

### DISTRIBUTION

- **174,000 advisors** who regularly read *Wealth Management* magazine and our Morning Memo daily newsletter
- **More than 550,000 unique monthly visitors** to the WealthManagement.com website (available for download)
- **Thousands of conference attendees** at major industry trade shows during the year (print overruns)



See what we published in our [2019 Midyear Outlook](#)

### PUBLISHING SCHEDULE

#### Midyear Review and Outlook

**Content submissions due:** July 27

**Ad closing:** July 24 • **Materials due:** July 31

#### 2021 Market Forecast

**Content submissions due:** November 4

**Ad closing:** December 4 • **Materials due:** December 11

**Nationwide**  
NATIONWIDE FINANCIAL SERVICES

**Five Factors to Drive Greater Growth in Challenging Markets**

By Craig Henders

**Discovering new possibilities for the first time.**

Nationwide Financial Services gives advisors new ways to serve their clients. For 100+ years, Nationwide has been a leader in providing innovative, forward-thinking financial solutions. And now, with the addition of Nationwide's new investment solutions, we can help you address your clients' needs in a whole new way. From life insurance to retirement planning, we have the expertise and resources to help you provide the best possible outcomes for your clients. Contact us today to learn more.

**LEARN MORE: [nationwideadvisors.com](http://nationwideadvisors.com) | 1-866-687-6364**

© 2019 Nationwide Financial Services. All rights reserved. This advertisement is not a contract. Please contact your advisor for more information. Nationwide Financial Services is a registered service mark of Nationwide Financial Services Corporation. All other marks are the property of their respective owners.

You can run an ad adjacent to your firm's content in our annual Midyear and Yearend Special issues at a fraction of the cost of our regular page rate

# 2020 Wealth Management Editorial Calendar

	JANUARY/FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY/AUGUST
THEME	Advisors and Technology	Personal Development	Independent Broker/Dealers	Longevity and Lifetime Income	Socially Responsible Investing	Diversity and Inclusion
ISSUE FEATURE	The Future of Wealth	Mental Health of Advisors	Private Equity and the IBD Channel	The Evolution of RIA-Friendly Annuities	Does ESG Deliver on Its Promises?	Serving the Growing LGBTQ Population Support for LGBTQ Advisors Planning for Non-traditional Marriages
RESEARCH	<ul style="list-style-type: none"> <li>• Advisor Tech Survey</li> <li>• Investment Trend Monitor: Advisor Top Trends for 2020</li> <li>• Investment Trend Monitor: Drivers of Portfolio Construction</li> </ul>	<ul style="list-style-type: none"> <li>• Causes of Advisor Stress</li> <li>• Investment Trend Monitor: Advisor Views on Value Add Programs and Thought Leadership Offerings</li> </ul>	<ul style="list-style-type: none"> <li>• Independent B/D Report Card</li> <li>• Investment Trend Monitor: Marketing Support</li> </ul>	<ul style="list-style-type: none"> <li>• Advisor Use of Annuities</li> <li>• Investment Trend Monitor: Advisor Use of Model Portfolios</li> </ul>	<ul style="list-style-type: none"> <li>• ESG/SRI Investment Trends</li> <li>• Investment Trend Monitor: Advisor Views on Internal Sales Desk and Sales Support</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Trend Monitor: Advisor Views on External Wholesalers</li> <li>• Investment Trend Monitor: Advisor Views on ESG/Diversity/Thematic Investing</li> </ul>
EVERY-ISSUE COLUMNS (Special Positions)	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>
CONFERENCES COVERAGE	<ul style="list-style-type: none"> <li>• InsideETFs • IMPACT • TDAI LINC</li> <li>• T3 Advisor Conference</li> </ul>		Investments & Wealth Institute	Morningstar Conference	Pershing INSITE	
BONUS TO ADVERTISERS*	Ad Recall Survey	Ad Recall Survey	Ad Recall Survey	Ad Recall Survey	Ad Recall Survey	Ad Recall Survey
AD CLOSING • MATERIALS DUE	January 16th • January 23rd	February 12th • February 19th	March 12th • March 19th	April 8th • April 15th	May 14th • May 21st	June 25th • July 2nd

	SPECIAL MIDYEAR ISSUE	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	SPECIAL YEAREND ISSUE
THEME	Midyear Review and Outlook	Ten to Watch Industry Awards: Best Initiatives 2020	Regulatory/Compliance Outlook	Business Growth and Profitability	ETF Landscape	2021 Market Forecast
ISSUE FEATURE	Company-Supplied Content on 2020 Review and Outlook	Philanthropy Strategies	An Analysis of State and CFP Board Fiduciary Rules/ Advisors and Regulation Best Interest	Real-time Business Intelligence	Building Portfolios with ETFs	Company-Supplied Content on 2021 Forecast
RESEARCH		Investment Trend Monitor: Product Usage	<ul style="list-style-type: none"> <li>• Survey of Chief Compliance Officers</li> <li>• Advisors and Regulation Best Interest</li> <li>• Investment Trend Monitor: Social Media &amp; Technology</li> </ul>	Investment Trend Monitor: Variable Annuities	Investment Trend Monitor: Alternative Investments	
EVERY-ISSUE COLUMNS (Special Positions)		<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Strategies</li> <li>• Fund Report</li> <li>• ETFs</li> <li>• Practice Management</li> <li>• Retirement Planning</li> <li>• College Planning</li> <li>• Client's Perspective</li> <li>• Wealth Planning</li> <li>• Tech Report</li> <li>• End Game</li> </ul>	
CONFERENCES COVERAGE			<ul style="list-style-type: none"> <li>• FPA Conference</li> <li>• WealthManagement.com Industry Awards</li> <li>• SS&amp;C (Black Diamond) DELIVER</li> <li>• MMI National</li> </ul>	Schwab IMPACT 2020	<ul style="list-style-type: none"> <li>• MarketCounsel</li> <li>• InsideETFs 2021 Conference</li> </ul>	
BONUS TO ADVERTISERS*		Ad Recall Survey	Ad Recall Survey	Ad Recall Survey	Ad Recall Survey	
AD CLOSING • MATERIALS DUE	July 24th • July 31st	August 6th • August 13th	September 10th • September 13th	October 7th • October 14th	November 3rd • November 10th	December 4th • December 11th

\*Available to advertisers who run 3 or more ads in Wealth Management in 2020

CIRCULATION: Digital: 174,000 advisors • Print: 60,000 (72% RIA's and Independents, 24% Wirehouses, 4% Other)  
Note: Editorial calendar subject to change without notice.



# Trusts & Estates

The leading information source for estate planning professionals and advisors to high-net-worth individuals, families and institutions

- Total audience: 70,000 active members
- 5,000 magazine subscribers (annual subscription: \$275)
- Multiple online, digital and print products and services for influencing the industry's most powerful audience of wealth planners

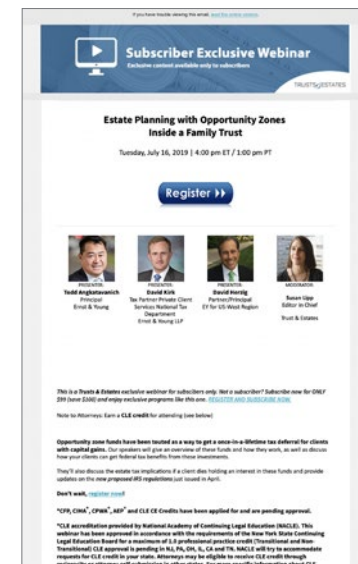
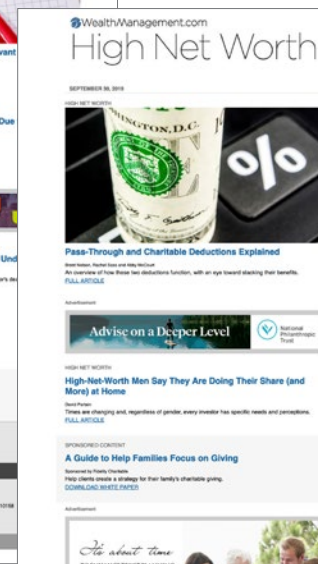
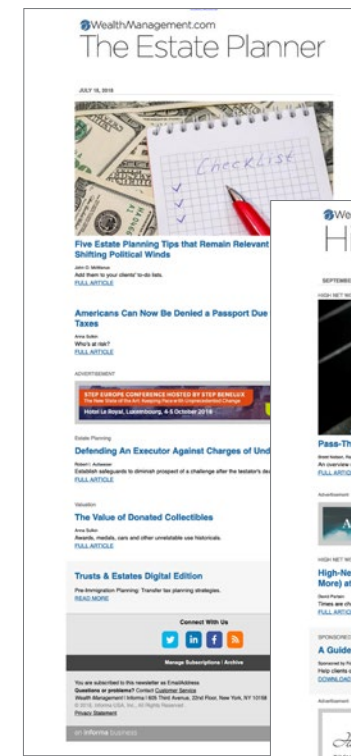
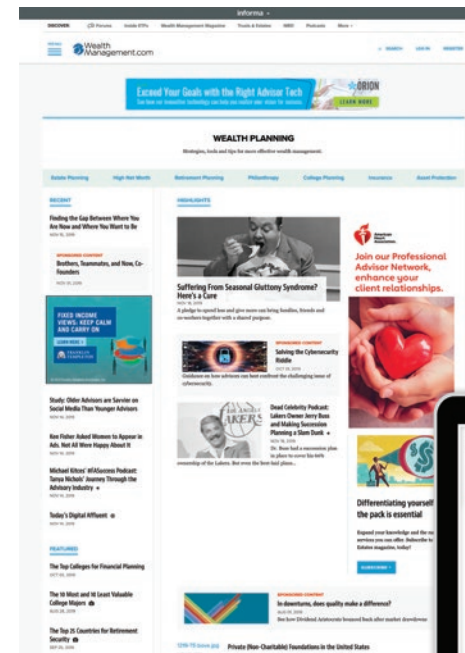
## AUDIENCE PROFILE

### Type of Firm

Law firm/attorney at law	24%
Financial planning/investment management	16%
Financial advisory	15%
Bank/trust company	9%
CPA/accounting firm	8%
Financial consultant	7%
Family office	6%
Insurance	4%
Other	11%

### Practice Areas

Estate planning and taxation	70%
Financial planning	50%
HNW families and family offices	44%
Investments	43%
Family business	36%
Insurance	34%
Retirement benefits	33%
Philanthropy	29%
Fiduciary professions	24%
Elder law	20%
Accounting	16%



# 2020 Trusts & Estates Editorial Calendar

## JANUARY

### Special Report: Year In Review

Our annual feature from the T&E editorial committees

### SPECIAL SUPPLEMENT

#### Tax Law Year in Review

By David Handler and the lawyers at Kirkland & Ellis LLP

Supplement Ad Closing: November 19th

Supplement Materials Due: November 26th

### ONLINE EXTRAS

#### Special Digital E-Book and Print Edition

The 2018 Distinguished Author Articles

E-Book Ad Closing: November 29th

E-Book Materials Due: December 4th

### GALLERY

Highlights from Heckerling

### WEBINARS

- 10 Best Estate-Planning Strategies for 2020  
Speakers: Robert Keebler and Steven Oshins

### ALSO IN THIS ISSUE...

- Best DAPT Jurisdictions  
by Dan Worthington & Marc Merric
- State of the States  
by Sharon Klein
- Charitable Gifts: Now the Charity Has Them;  
Then it Doesn't by Conrad Teitell

Ad Closing: December 5th

Materials Due: December 12th

## FEBRUARY

### Committee Report: The Modern Practice

Strategies attorneys should use to increase business, work successfully and communicate with their clients

### SPECIAL SUPPLEMENT

#### VALUATIONS

Supplement Ad Closing: January 3rd

Supplement Materials Due: January 10th

### ONLINE EXTRA

#### WEBINAR

Highlights of Heckerling

Speaker: Marty Shenkman

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: January 9th

Materials Due: January 16th

## MARCH

### Committee Report: Family Businesses

A look at various issues affecting family businesses

### SPECIAL SUPPLEMENT

Art, Auctions & Antiques

Supplement Ad Closing: January 31st

Supplement Materials Due: February 7th

### ONLINE EXTRAS

#### GALLERY

Art, Auctions & Antiques

### WEBINAR

Planning With Art

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: February 6th

Materials Due: February 13th

## APRIL

### Committee Report: Insurance

### ONLINE EXTRA

#### WEBINAR

Insurance

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: March 12th

Materials Due: March 19th

## MAY

### Committee Report: The Fiduciary Professions

### ONLINE EXTRA

#### WEBINAR

Update on Fiduciary Case Law and Trends

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: April 8th

Materials Due: April 15th

## JUNE

### Committee Report: Retirement Benefits

### ONLINE EXTRA

#### WEBINAR

Retirement Benefits

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: April 30th

Materials Due: May 7th

## JULY

### Committee Report: Elder Law

### SPECIAL REPORT

Review of Reviews

### ONLINE EXTRA

#### GALLERY

PDFs of Law Review Articles

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: June 17th

Materials Due: June 24th

## AUGUST

### Committee Report: High-Net-Worth Families & Family Offices

Special Supplement: Trust Law Roundup

### ONLINE EXTRA

#### WEBINAR

E-book Geared to Family Offices

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: July 8th

Materials Due: July 15th

## SEPTEMBER

### Committee Report: Investments

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: August 5th

Materials Due: August 12th

## OCTOBER

### Charitable Giving Special Issue

### ONLINE EXTRA

#### WEBINAR

Charitable Giving

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

### BONUS TO ADVERTISERS

Ad Recall Survey

Ad Closing: September 10th

Materials Due: September 17th

## NOVEMBER

### Committee Report: International

### ONLINE EXTRAS

#### GALLERY

Countries With the Most Favorable Estate Taxes

### WEBINAR

Highlights of Notre Dame Conference

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: October 14th

Materials Due: October 21st

## DECEMBER

### Committee Report: Estate Planning & Taxation

### ONLINE EXTRA

#### WEBINAR

End-of-Year Wrap-Up

### ALSO IN THIS ISSUE...

Briefing: Tax Law Update, Philanthropy Column, Tips From the Pros

Ad Closing: November 2nd

Materials Due: November 9th

Note: Editorial calendar subject to change without notice.



# RESEARCH

- Custom research programs
- Investment Trend Monitor sponsorships
- Editorial research sponsorships





## Custom research programs

### Informa Research Study, Underwritten by Sponsor

- 15-question, editorially-driven survey
- 100+ respondents from target audience

### Co-Branded Report

- Market-facing data report (10-15 pages)
- Graphical summary report for sales presentation decks
- Unlimited usage rights to share insights

### Promotion & Engagement

- Dedicated landing page featuring report to capture leads
- Turnkey, multi-channel marketing campaign (email, newsletter, site & social)
- 150 leads\*, delivered over 3 months (adjust down for filters)
- Report includes contact info

**Timing:** 6-8 weeks from kickoff + promotional period

### Client reporting

- Bi-weekly reporting (3 months)
- Lead breakout by asset (research report vs client assets) for "State of the Market"
- Geo & industry breakouts (where applicable)

### Lead data included:

- ✓ Name
- ✓ Title
- ✓ Industry
- ✓ Email
- ✓ Phone
- ✓ Location





# Investment Trend Monitor research sponsorships

These interpretive peer-to-peer research reports on today's most timely topics are aimed at helping advisors understand what other advisors are thinking — and how that affects their decision-making.

## 2020 Investment Trend Monitor Survey Schedule

Advisor Top Trends for 2020	January
Drivers of Portfolio Construction	February
Advisor Views on Value Add Programs and Thought Leadership Offerings	March
Marketing Support	April
Advisor Use of Model Portfolios	May
Advisor Views on Internal Sales Desk and Sales Support	June
Advisor Views on External Wholesalers	July
Advisor Views on ESG/Diversity/Thematic Investing	August
Product Usage	September
Social Media and Technology	October
Variable Annuities	November
Alternative Investments	December

## DETAILS

- Thought leadership (exclusive sponsorship)
- Content channel takeover
- Ad unit exclusivity
- 125,000 guaranteed impressions (includes website plus all email newsletter marketing)
- 250 qualified leads (contact info from all registrations and downloads)
  - 4-5 original stories on the survey results including charts and graphs
  - Infographic gallery describing topline survey results
  - Branding (logos on all marketing materials)





# Editorial research sponsorships

Also published in *Wealth Management* magazine, this research reveals the latest trends in key practice management and investment areas for financial advisors and planners across all advisory channels – independent B/Ds, RIAs and wirehouses.

## 2020 Editorial Research Schedule

January/February	Advisor Technology
March	Causes Behind Advisor Stress
April	Independent B/D Report Card
May	Advisor Use of Annuities
June	ESG/SRI Investment Trends
September	RIA Benchmarking
October	Survey of Chief Compliance Officers Advisors and Regulation Best Interest

## DETAILS

- Distribution in *Wealth Management* magazine (174,000 print and digital circulation) and on WealthManagement.com (550,000 unique monthly visitors)
- Full-page, four-color ad adjacent to research content
- Optional channel takeover sponsorship opportunities
  - 250 qualified leads (contact info from all registrations and downloads)
  - Branding (logos on marketing for driving downloads)

[See Example](#)





# CONTENT MARKETING

- Custom content development
- Sponsored content posts
- White papers
- Infographics
- Custom enewsletters
- Thought leadership spotlight



**informa**





# Custom content development

## Content marketing assets that capture attention

Leverage WealthManagement.com's content experts, creative talent and marketing savvy to add a powerful advantage to your content marketing campaigns. We have the experience and know-how to develop content assets that resonate with your target audience — unique, custom content that offers long-term marketing value.

### DETAILS

- Sponsored content posts
- White papers
- Infographics
- Custom newsletters

### NEW: ONE-PAGE ARTICLE CREATION

- We write an article on an assigned topic (500 – 800 words in length)
- We promote via single sponsored content distribution in various e-newsletters
- Cost includes several rounds of revisions (marketing department, compliance department, etc.)
- You have final approval on copy and design and can provide your own design template
- Deliverable is a PDF
- Schedule: 1-2 weeks
- Averages 100 reads per newsletter promotion — open rate averages 30-35%

[See Sample](#)




## Sponsored content posts

Inject your voice into our trusted editorial content on WealthManagement.com and in targeted newsletters

Distribute your articles, infographics, videos and other educational materials seamlessly next to WealthManagement.com expert content.

- Placements within pointed channels on WealthManagement.com
- Traffic-driver placements in your choice of 9 targeted newsletters:
  - Morning Memo
  - Daily Memo
  - High Net Worth
  - Practice Management
  - The Estate Planner
  - FinTech
  - Investment Strategies
  - ETF Strategies
  - Retirement Plan Advisor

AVERAGE TOTAL IMPRESSIONS: **195,000**

AVERAGE PAGE VIEWS: **500 – 1,000**

WealthManagement.com  
**MorningMemo**

**Rockefeller Capital Management Lands New COO To Lead Build Out Of Wealth Business**  
Diana Britton  
Chris Dupuy left his job was done at Focus, and was attracted to the opportunity to build a wealth management platform from scratch.  
[FULL ARTICLE](#)

**SPONSORED CONTENT**  
**Visit the Cybersecurity channel**  
Sponsored by United Planners Financial Services  
Get timely information and innovative solutions to diminish your risk of cyber-attacks.  
[READ MORE](#)

**Practice Management**  
**Six Internal Disruptors That Can Fuel Growth**  
Matt Ouchell  
Elite advisors aren't fretting about industry disruptors. Here's why.  
[FULL ARTICLE](#)

**Sponsored Content**  
**Do Rising Rates Equal Client Panic? Maybe. Maybe Not.**  
Sponsored by Hartford Funds  
Rising rates can signal impending volatility. Learn why in this piece from Hartford Funds.  
[FULL ARTICLE](#)

**Insurance**  
**A Life Insurance Mystery: Underwriting**  
Bill Bowers  
It's more important and flexible than you may think.  
[FULL ARTICLE](#)

**The Daily Brief**

**Vanguard CEO Tim Buckley Will Succeed Bill McNabb as Chairman**  
Michael Thresher  
Buckley will be the fourth chairman in the history of the \$5.3 trillion investment management firm.  
[FULL ARTICLE](#)

WealthManagement.com

**RECENT**  
The Path to Independence in Two Steps or One – With Alex Goss of Goss Advisors  
NOV 01, 2019

**TOP STORIES**  
**Empower Retirement Plans Digital Wealth Management Transformation**  
NOV 01, 2019  
One of America's largest retirement plan providers announced plans to partner with robo-WealthAdvisor and eInvestment Advisor.

**SPONSORED CONTENT**  
**Visit the Cybersecurity channel**  
Sponsored by United Planners Financial Services  
Get timely information and innovative solutions to diminish your risk of cyber-attacks.  
[READ MORE](#)

**Merrill Lynch Cuts Adviser Compensation to Control Costs**  
NOV 01, 2019  
The brokerage is looking to trim 1 percent of adviser production costs.

**With the Best Tech Tools, Access Matters**  
COURTESY, CIBC  
How independent advisors turn the flexibility to choose the tools.

**UBS Debuts Program to Help Advisors Serve Small 401(k) Providers**  
NOV 01, 2019  
ETFs That May Take the Sting Out of a Market Correction  
NOV 01, 2019

**Sign up for the Morning Memo newsletter.**  
First Name: [input] Last Name: [input] Email: [input] [Sign Up](#)

**ETF OVERVIEW**  
Category: All Funds Search fund name: [input]

Exchange Traded	Fund Name	Last Expense Ratio	Assets under Mgmt	Avg. Daily Volume
SPY	SPDR S&P 500 ETF Trust	0.0945 %	251,195,084,058	77,880,100
IYV	iShares Core S&P 500 ETF	0.04 %	199,327,826,000	5,768,450
VFI	Vanguard Total Stock Market ETF	0.04 %	100,412,007,222	3,482,810
VDO	Vanguard S&P 500 ETF	0.04 %	98,818,275,000	3,607,300
VSI	Vanguard FTSE Developed Markets ETF	0.07 %	67,014,718,000	9,398,380
QQQ	Invesco QQQ Trust	0.2 %	66,002,877,000	41,514,100



# White papers

We can help you create custom content around key industry topics

White papers are a great way to establish subject-matter expertise and thought leadership while generating qualified leads. We can provide writing, editing and design services before posting your finished white paper PDF in our online white paper library. White papers are promoted in special spotlight emails to 120,000+ producing advisors along with placements in our Morning Memo and Daily Memo newsletters (distribution: 174,000). You receive weekly leads from white paper download registrations.

Already have white papers? Let us distribute them to the industry's leading audience of wealth managers

## DETAILS

- White paper placed within the WealthManagement.com White Paper Library for six months
- Inclusion in two White Paper Spotlight emails (distribution to 120,000 producing advisors and RIAs)
- Morning Memo and Daily Memo native post placements (174,000 distribution)
- Registration form with company logo plus custom questions
- Leads emailed weekly
- Estimated impressions of program:
  - Morning Memo:  $40,000 \times 2 = 80,000$
  - Daily Memo:  $30,000 \times 4 = 120,000$
  - White Paper Spotlight:  $15,000 \times 2 = 30,000$
  - Total estimated impressions estimate (open/views) = 230,000



See Sample



# Infographics

Provide a captivating experience for advisors with information that's easily, clearly and quickly understandable at a glance

Infographics are one of the most popular forms of content on the web today, driving more traffic than most traditional content due to their highly-visual and easy-to-digest format that helps advisors translate data into meaningful insights. Infographics draw a wider viewing audience into information that might otherwise be hidden in long-form content. And they also encourage social sharing of your content.

## DETAILS

- Custom design based on content by our subject-matter experts and designers
- Optimized images for sharing, social media and organic search
- Own the asset and use in parallel marketing programs







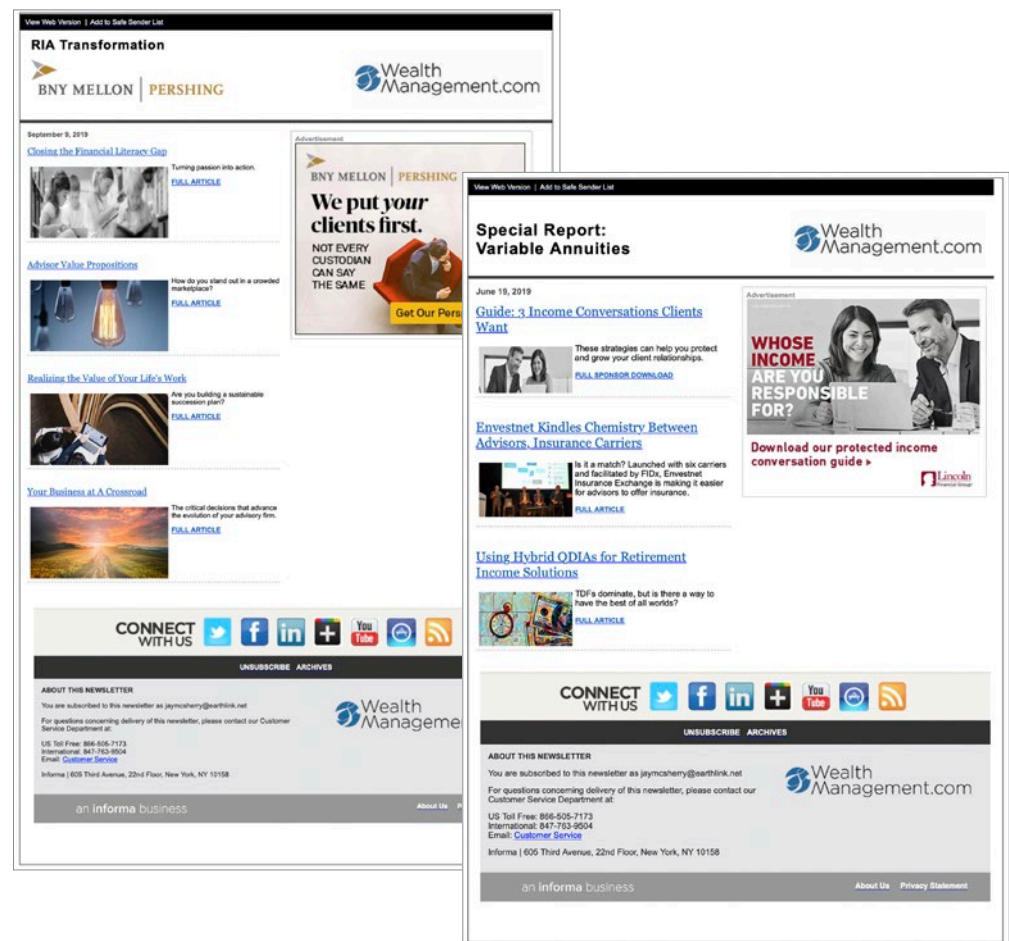
# Custom newsletters

Engaging and educational content sent directly to your target audience

Content for your custom newsletters can consist of materials supplied by you, WealthManagement.com editorial articles on aligned topics — or a combination of both. You choose the target audience and frequency best suited for your custom newsletter.

## DETAILS

- Sponsor-supplied content can include charts, videos, infographics, etc.
- Exclusive sponsorship (all ad units)
- Reporting provided includes emails sent, emails opened, content clicks, banner ad/logo clicks







# Thought Leadership Spotlight

Showcase your unique insights with expert Q&A delivered to an audience of 435,000+ financial professionals

In a highly competitive market, it is more important than ever for asset managers to gain the attention of wealth advisors. WealthManagement.com understands your needs and has designed a thought leadership Q&A to merchandise your brand and expertise through our growing audience of financial professionals.

## INTERVIEWS

- Interview with five standard questions conducted by a WealthManagement.com expert
- Includes display of subject matter expert photo and firm logo
- Published on WealthManagement.com as sponsored content
- Content will be promoted in the Morning Memo and Daily Memo newsletters and tagged to relevant categories on the website

## MARKETING AMPLIFICATION

- 3x sponsored post in Morning Memo or Daily Memo newsletters to drive online engagement
- Leverages WealthManagement.com social media and organic SEO
- Articles can be posted to asset manager website and branded channels using WealthManagement.com logo

## THOUGHT LEADERSHIP AVERAGE PERFORMANCE:

30%

average open rate

200

average content clicks

283

average page views

[See Sample](#)



# LEAD SERVICES

- Lead generation
- Guaranteed lead programs
- Email services
- Ebook sponsorships





# Lead generation

Leverage our audience and trusted platforms to distribute your valuable content assets and generate high-quality leads

Leading advisors rely on WealthManagement.com for information that will help them manage their practice and grow their business. Our lead generation programs can distribute your valuable thought leadership content to targeted audiences with keen interest in your message. Registration is required to view the content so you receive regular reports with contact information for each qualified lead.

## LEAD GENERATION PROGRAMS INCLUDE:

- Guaranteed lead programs
- Research sponsorships
- Webinars
- White papers
- Ebooks
- Email





# Guaranteed lead program

WealthManagement.com can provide you with an agreed upon number of highly-qualified leads based on your specific goals and requirements

In short, you determine the parameters and pay a fixed price-per-lead delivered.

## **FIELDS COLLECTED**

Contact name, company name, title, full business address, email and phone.

## **CUSTOM QUESTIONS**

We allow up to three (3) custom questions per offer.

## **TARGETING**

Achieved at a brand level, as well as through custom questions.

## **VALIDATION**

The network validates business address, email and phone.

## **DELIVERY**

Leads are delivered in real time, daily feeds or weekly feeds

(60 lead minimum)





## Custom email services

Message directly to the inboxes of those financial advisors you're trying to reach

Email remains one of the most effective methods for targeting and reaching financial advisors with specific messaging. Fortunately, you can leverage the power and scale of the WealthManagement.com audience database. Based on your objectives and goals, we can set up and deploy targeted email campaigns that engage exactly the wealth management professionals you want to reach.

### DEMOGRAPHIC TARGETS INCLUDE:

- Age
- Gender
- Advisor channel
- Assets under management
- Region
- Years of experience
- Licenses
- Job titles
- Product usage
- Sales volume
- ...plus 84 other selects

List rental from WealthManagement.com enables you to tap into databases of highly qualified and engaged audiences across the entire wealth management spectrum.

### DATABASES

- 380,000 financial advisors
- 69,000 HNW wealth planners
- 61,000 retirement plan advisors
- 16,000 retirement plan sponsors
- 17,000 institutional consultants



## Faster, Smarter Property Valuation

### Reduce your appraisal procurement process by as much as 60%

Competitive pressures are requiring real estate lenders and investors to complete underwriting and due diligence more quickly and cost effectively than ever, but not at the expense of prudent risk management, or for banks, compliance.

One of the most time consuming and costly components to lending is the data collection and analysis required for underwriting, especially the appraisal procurement and review process. Determining property value is a mission critical function for any institution originating loans, or for those investing in real estate.

While technology exists to streamline the process, the reality is most lenders still use excel spreadsheets, word processing software and email to support the process.

**Download this FREE case study** that provides a time study comparison of the appraisal processes at several lending institutions. Compare your process to determine how efficient you are!



[DOWNLOAD CASE STUDY >](#)





## Custom ebooks

Create highly desirable, rich content designed to engage and educate advisors

- Custom sponsored content distributed by email to a targeted list. Content can also be supplied by you or created by WealthManagement.com — or both
- Ebooks use electronic “page-turning” technology that displays content in a magazine-style format
- Content is interactive and can be comprised of photos, graphs/charts, research, advertisements, video and custom written copy
- Lead generation registration capabilities
- Engagement tracking based on behavioral activity

[See Sample](#)





# Advisor Playbook sponsorships

An exclusive editorial ebook sponsorship program for marketers seeking qualified lead generation and thought leadership

## EDITORIAL CONTENT

- 10 commentaries on targeted topics related to a specific subject
- PDF ebook format
- Downloaded from WealthManagement.com (registration required)

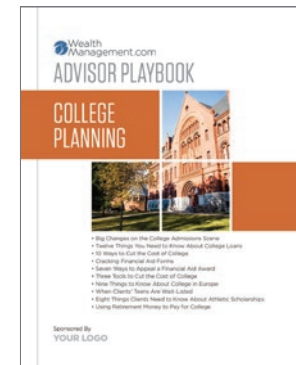
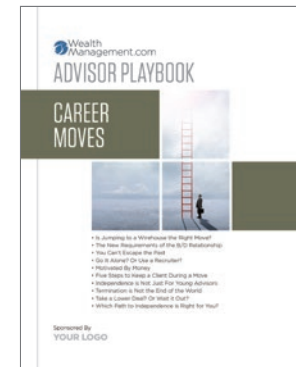
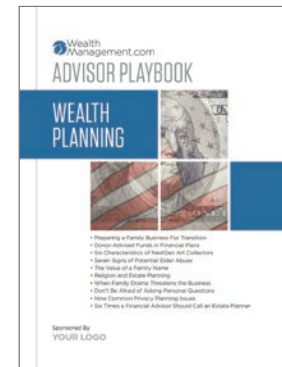
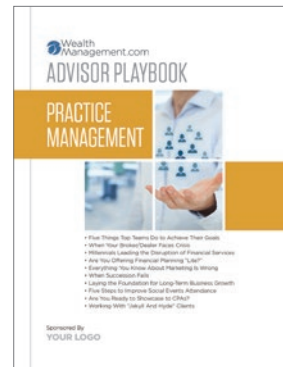
## LEAD GENERATION

- Generated from ebook downloads
- 250 qualified leads

## SUGGESTED TOPICS INCLUDE:

- Practice Management
- Wealth Planning
- Career Moves
- Retirement Planning
- Investment Strategies
- College Planning

## CUSTOM TOPICS AVAILABLE—ASK FOR DETAILS



# LIVE EVENTS

- Webinars
- Podcasts
- Industry Awards



**informa**



# Webinars (including lead touch)

Elevate your experts, generate qualified leads and maximize ROI

Your best prospects are individuals who are actively looking for solutions and education. Our webinars allow you to generate hundreds of qualified leads while aligning your company with industry experts.

## DETAILS

- Attracts a high-quality group of advisors you can't reach anywhere else
- Address specific product and service questions in the interactive Q&A
- Easily analyze overall event performance with detailed reports
- Continuing Education (CE) credits offered
- Post-webinar lead touch/lead nurturing program also available

Gain even greater return on your webinar investment by engaging leads immediately after your event to maintain a conversation with advisors. The program includes creation of an executive summary along with a series of three emails to registrants to encourage sharing, drive on-demand views, and expose advisors to related content.

## DETAILS

- Co-branded marketing piece included that summarizing key highlights from webinar
- 3-touch email follow-up strategy
- Customized messaging depending on registrant action
- Summary reporting at close
- Using for nurturing webinar leads, extending the life of your webinar, and repurposing your webinar content
- Average: 440 registrants; 42% live attendance rate



[See Sample](#)





## Custom Podcasts

A turnkey solution to help you create and distribute your very own podcasts

We produce your podcast from start to finish — including professional audio equipment, graphics and coaching

- We supply the moderator
- We provide onsite recording and post-production
- We produce your podcast in streaming format and as a transcript for compliance review

**We publish your podcast** on Wealthmanagement.com, the leading site for wealth management professionals

- Choose the relevant channel on our site to host your sponsored content podcast
- Receive a copy of your podcast to post on your own website

**We promote your podcast** to the targeted advisor audiences you choose to reach

- 25,000 ROS native post impressions on our site
- Promoted three times with sponsored posts in the Morning Memo newsletter, once in the topic-specific newsletter of your choice (Investment Strategies, FinTech, etc.) and on our social media channels
- Syndicated on major podcast channels including iTunes, Stitcher, Podbean, Spotify, AppleTV, YouTube and Google Podcasts.

**Each podcast includes monthly “plays and clicks” performance metrics**

[Hear Example](#)



*Advisors are fast recognizing podcasts as a convenient and time-efficient way to consume information*





# Sponsored Editorial Podcasts

Align your thought leadership with programs produced by our editorial staff



**Diana Britton,**  
Managing Editor,  
WealthManagement.com

[Sample](#)

## Transparency with Diana Britton

A personal development and wellbeing podcast series for wealth management professionals

### DETAILS

- Host: Diana Britton, Managing Editor, WealthManagement.com
- Broadcast length: About 25 minutes
- Sponsorship deliverables:
  - Sponsor logo posted on the Transparency Podcast landing page — Sponsor mentions in the intro, midway and end of each broadcast
  - Promoted with three sponsored posts in the WealthManagement.com Morning Memo and/or Daily Memo newsletters and on our social media channels
  - One email promotion to the WealthManagement.com audience of 174,000 wealth management professionals
  - Syndicated on major podcast channels including iTunes, Stitcher, Podbean, Spotify, AppleTV, YouTube and Google Podcasts



*Advisors are fast recognizing podcasts as a convenient and time-efficient way to consume information*



**David H. Lenok**  
Senior wealth  
planning editor  
WealthManagement.com

[Sample](#)

## Wills of the Rich and Famous

Celebrity estate-planning podcast series

### DETAILS

- Host: David Lenok, Senior Wealth Planning Editor, WealthManagement.com
- Broadcast length: About 25 minutes
- Sponsorship deliverables:
  - On-air mention as the sponsor at the beginning and end of the podcast

- Promoted three times in newsletters with sponsored posts (Morning Memo, High Net Worth and The Estate Planner) and on our social media channels
- Promoted in an emailing to 200,000 financial advisors and estate planning professionals
- Syndicated on major podcast channels including iTunes, Stitcher, Podbean, Spotify, AppleTV, YouTube and Google Podcasts

**Each podcast includes monthly “plays and clicks” performance metrics**

# Wealth Management.com Industry Awards

**September 10, 2020 • Ziegfeld Ballroom • New York City**

The WealthManagement.com Industry Awards program is designed to recognize outstanding companies and organizations that support financial advisor success.

## **About the Awards.**

### **Last year's program was expanded to include...**

- **More individual awards** — including CTO of the Year and CMO of the Year (on top of our RIA firm leader awards for CEO of the Year, Innovator of the Year, M&A Leader of the Year and Thought Leader of the Year)
- **More fintech award categories** — including Unified (All-In-One) Systems, Specialized Planning, Cybersecurity, and Onboarding/Account Opening
- **More networking opportunities** for attendees of this year's awards event including our Technology Roundtable daytime session

### **...and the 2020 program will be even bigger.**

A panel of judges made up of top names in the industry will determine the 2020 award winners in more than 90 firm and individual categories.

**The WealthManagement.com Industry Awards are presented at a black tie event each fall in New York City. There's no cost to nominate your firm.**

We invite you to join us by completing a nomination application, and tell us about the great things you are doing to help advisors do the best job they can for their clients.

## **ASK ABOUT SPONSORSHIP OPPORTUNITIES**

To nominate your organization, visit  
**Events.WealthManagement.com**



## **UNIQUE VALUE PROPOSITION**

- Superior PR opportunity
- Validates your marketing message
- Thought leadership statement
- WealthManagement.com seal of approval
- Leverages WealthManagement.com marketing and distribution to the industry

## **GENERAL AWARDS CATEGORIES**

- 401(k) — Retirement Plans Support Services
- Asset Managers
- Broker/Dealers
- Compliance/Law Firms
- Custodians
- Disruptors
- Family Offices
- Hedge Funds/Private Equity
- Individual RIA Firm Leaders
- Industry Associations
- Industry Research Providers
- Insurance
- Investment Banks/Lenders/Succession Planning Consultants
- Non-Custodial RIA Support Platforms
- Succession/Ownership Transition Services—Non-Custodian/Broker Dealer
- TAMPS
- Technology Providers
- Trusts

# DIGITAL PRODUCTION SPECS



**informa**



# 2020 Digital Specifications, Terms & Conditions

## Effective January 2020

### 1. WEBSITE AD SPECIFICATIONS

#### a. Website Ad Positions & Dimensions:

728x90.....	Leaderboard
300x250 (Expandable to 300x600).....	Standard Unit (right)
300x250 (Fixed) .....	Standard Unit (left)
320x50 (Mobile Phone) .....	Leaderboard

#### b. Site Skin Ad Requirements

Website site skin ads allow an advertiser to brand the margins of a website for various campaign durations. It can be served in conjunction with ROS banners or with a sponsorship campaign to create the appearance that site or area is “owned” by the advertiser.

#### Option #1: Home Page Site Skin Ads

**Position:** Home page

**Availability:** One advertiser per contracted period, 5,000 impressions minimum

**Ad Size:** Live area (per side):

160 pixels wide (minimum) x 700 pixels deep

#### Special Instructions:

- Creative should be delivered as a single image, separated by 970 pixels
- Lead time: 10 days
- Maximum file size: 200k
- Accepted formats: GIF, JPEG or PNG

#### Option #2: Channel Targeting Wallpaper Ads

**Position:** Channel run of site

**Availability:** One advertiser per channel, 5,000 impressions minimum

#### Channel Options:

- News
- Investment — Only subsections are available: ETFs, Equities, Mutual Funds, Alternative Investments, etc.
- Wealth Planning
- Practice Management
- Real Estate
- Technology
- Research
- Resources

**Ad Size:** Live area (per side):

160 pixels wide (minimum) x 700 pixels deep

#### Special Instructions:

- Creative should be delivered as a single image, separated by 970 pixels
- Lead time: 10 days
- Maximum file size: 200k
- Accepted formats: GIF, JPEG or PNG

#### Maximum Banner Size: 200k

#### Banner Formats:

Currently Accepted: GIF, Animated GIF, JPEG, HTML, PNG, Most 3rd Party Tags

**Rich Media:** All Rich Media must be accompanied by a standard GIF for use as fall back for non-rich media enabled browsers. Standard turnaround time for Banners is 2 business days for non-Rich Media and 5 business days for Rich Media. More may be required for testing of new media formats. All Rich Media must include a target=blank command that will launch a new browser; this is especially important for any file with JavaScript language. All enhanced content Rich Media (expanding window, audio, etc.) must be user-initiated. Automatic play or pre-expand are not allowed.

**HTML:** The following guidelines must be observed: Informa utilizes Javascript ad tags on its pages. HTML banners must be constructed to work within these tags. HTML banners may either call to the client's server for component images or the component images may be submitted along with the HTML code directly to Informa. All component images must observe file size restriction and total combined file size of component images should not exceed maximum specified file sizes for the appropriate banner size. In order for DART to track clicks on HTML banner with a 'form action' field (such as pull down menus, or typed search entry banners) you MUST use the form method=get and NOT form method=post. Informa will then be able to track clicks on your banner, though we may not be able to track clicks to multiple URLs separately. <HTML> and <BODY> tags are not required. If you need to use <BODY> for your formatting you should substitute <TABLE> tags instead.

**File Sizes and Looping:** (File size applies to direct upload/initial load only, not redirect or polite downloads. Polite downloads may be up to 100K after initial load. Looping and frames do not apply to Flash):

**Max File Size: 200k Max Frames: 4 Max Looping: 3 times**





# 2020 Digital Specifications, Terms & Conditions

## 2. NEWSLETTER AD POSITIONS & DIMENSIONS:

Newsletters text sponsorships include 60 words of text, including headline, plus linking URL. Logo and banner specs are as follows:

### Morning Memo and Daily Memo

(With optional text — 60 words max)

- 580x327
- 580x80
- 180x150
- 300x416 or 300x250 (mobile)

**Accepted Banner Formats:** GIF, JPEG or PNG. No Rich Media.

### File Sizes and Looping:

**Max File Size: 200k Max Frames: 4 Max Looping: 3 times**

**NOTE:** Not all sizes are available on all Informa Web sites. Please confirm the exact size for each contracted unit with your sales representative. Banner positions and static graphics specified may not be available for all positions in all newsletters. Please verify the allowed materials.

## 3. EBLAST (CUSTOM) REQUIREMENTS

- a. Size:** Maximum of 600 pixels wide by 400 pixels high; 50K limit
- b.** Generally an eblast is text only. If a graphic is included, the total files size cannot exceed 50k.
- c.** Materials are due a minimum of 7 business days prior to email deployment date.

**d.** Provide creative in final form. If you are hosting the images in your HTML email, please verify that they are linked correctly. If we are hosting the images, please provide the supporting files separately, but be sure to provide HTML file with graphics linked in relative format (i.e. put both the graphic files and HTML file in the same folder and link to the images in your HTML like . Do not use cascading style sheets when creating your file. In-line styling is acceptable.

**e.** Graphic formats currently accepted: GIF, Animated GIF, and JPEG (not accepting rich media at this time).

**f.** Provide the URLs that are included in your HTML, a subject line and the company name as it should to appear in the from line.

**g.** Client must provide email suppression file (if they have one) of email addresses from people that have opted-out of email communications from the client. WealthManagement.com takes this file and suppresses it from our list so that no one who has opted out from communications from the client will receive their promotional email (in compliance with the CAN-SPAM Act). If the client doesn't have one, and the client is using their own insertion order and not a standard WealthManagement.com insertion order, it is necessary to sign a third-party letter of indemnification.

**h.** No eblast can be deployed without a suppression file, a signed WealthManagement.com insertion order and a signed third-party letter of indemnification on file.

## 4. EXPANDABLE AD UNIT REQUIREMENTS

This format is available in all in-page units. The advertisement expands either in width or height (not both) when the user hovers over or clicks on the ad. This unit must be provided as a third party ad tag and meet the specifications below. Both the top 728x90 and the top 300x250 expand on this page.

## Specs and acceptable formats:

- **Max banner size:** 200k initial; 100K polite download
- **Max # of panels:** 4
- **Panel activation/closing:** On mouse over or click with clear and obvious "close" text
- **Max panel expansion dimensions:** In general, the expansion should not exceed twice the original width or height. However, 300x250 units expanding to the left or right should not to exceed 500x250
- **Expand direction:** Top leaderboards should expand down only; left rail units should expand to the right; and right rail units should only expand to the left. Bottom leaderboards should expand up only, if utilized
- **Audio/Video acceptance:** User initiated only; controls should include "Close X", "Play", "Pause", "Rewind" and "Volume"
- **Maximum video weight:** 1.2MB streaming video max

## 5. HOME PAGE TAKEOVER REQUIREMENTS

The site or home page takeover provides advertisers with the ultimate exposure. Every ad unit on the site or home page will belong to the advertiser for a specified campaign duration (24 hours, a week, etc.). In addition, advertisers may also choose to add a skin to the takeover for greater impact. Consult your rep to confirm creative options.

## 6. INTERSTITIAL AD REQUIREMENTS

This format is designed to deliver an advertisement to the user no matter what point of entry they take to arrive at the WealthManagement.com website and is generally capped at a frequency of one per 24 hours, but it can be vary. The user will see this advertisement "hover" over the site's content for a specified duration, with the option to close it at any time. This unit must be provided as a third party ad tag and meet the specifications below.





# 2020 Digital Specifications, Terms & Conditions

## 7. PRE-ROLL REQUIREMENTS

WealthManagement.com accepts video pre-roll advertisements. A pre-roll video is a short clip that precedes the video that a user has chosen to watch. The duration of pre-roll videos will vary from site to site but is typically between 10 to 15 seconds in length.

### Specs and acceptable formats

- **File Format:** FLV (Streaming Flash)
- **Size:** 640x360 at 16:9 ratio
- **Minimum bit rate:** 700kbps
- **Maximum bit rate:** 1500 kbps
- **Lead time:** 10 days

## 8. ROADBLOCK/INTERSTITIAL/WELCOME AD

A roadblock (sometimes referred to as a sponsored site introduction) is designed to display an ad to the user upon his or her first visit to the website for a specified length of time. It is typically capped at a frequency of one per day per unique user, but these settings are variable. The site's content can be covered completely by a white box or displays faintly beneath a semi-transparent white box and the advertisement is displayed with the message "Sponsored Introduction." The duration for site intros is generally 10 to 15 seconds. A "continue" link is included to ensure optimal user experience.

### Specs and acceptable formats:

- **Sizes:** Ad sizes vary, but optimal dimensions are 640x480
- **Time:** 10 - 15 seconds
- **File size for standard formats:** 200k. Formats: JPEGs, GIFs, PNG, SWF, Java, IFrame, and most third-party tag
- **Third-party Specs:** 200K initial, 100K polite
- **Close button:** not required

## 9. VIDEO (IN-BANNER) REQUIREMENTS

WealthManagement.com accepts in-banner video units for in-page units. These rich media advertisements allow for user-interaction to play within traditional ad placements. This unit must be provided as a third party ad tag. Video plays in both the 728x90 and 300x250 units.

### Specs and acceptable formats:

- **Audio:** user-initiated only
- **Controls:** "Close X", "Play", "Pause", "Rewind", and "Volume" are generally required
- **Lead time:** 5 days
- **Initial file size:** 200k
- **Additional File Weight:** 1.2 MB
- **Most third-party tags accepted**

## 10. WEBINAR REQUIREMENTS

### a. Title and description of the webinar

Description should be in paragraph form AND include bullet points of what attendees will learn.

### b. Sponsor logo

Photoshop or other high-resolution format (.JPEG/.tif /.eps).

### c. Registration page custom questions

Up to three custom questions to go at the end of the regular business card questions that are asked during registration. These questions can help you score the leads so you know which ones are "hotter" than others.

### d. Speaker information

To produce materials and effectively market your webinar, we will need a digital photo of each speaker, their full name, official title and company, along with a brief bio (no more than three paragraphs). We will also need their contact information to distribute meeting information to them.

## 11. WHITEPAPER REQUIREMENTS

### a. Whitepapers should be delivered as PDF files

### b. Be sure to include:

- A high-resolution company logo (JPEG 595x335px)
- A one-two paragraph description of the whitepaper
- All information fields you would like to use for lead generation (first name/last name, job title, company, etc.)
- Email addresses of the people who should receive the leads each week

# MAGAZINE PRODUCTION SPECS



**informa**



# 2020 Magazine Ad Production Specifications, Terms & Conditions

## Effective January 2020

### 1. DISPLAY ADVERTISING

As used in this section, the term "Publisher" shall refer to the Informa WealthManagement.com publications.

#### a. Frequency:

Number of units within 12 months from date of first insertion in contract period determines frequency rate.

#### b. Spit Runs and Combinations:

Consult Publisher.

#### c. Supplied Inserts and Business Reply Cards (BRCs):

Accepted in all issues on a space-available basis. Special charges in addition to space rates are non-commissionable. For more information, contact your local sales representative.

#### d. Special Position:

Cover 2 .....	45% premium
Cover 3 .....	35% premium
Cover 4 .....	45% premium

All other special positions: 15% premium. Special positions are subject to availability. For more information, contact your local sales representative.

**e. Short Rates:** Advertisers billed at special contract rates based on frequency, but who fail to fulfill the contract, will be billed at the Publisher's sole discretion for the difference to reflect the rate that is actually earned. For example, advertisers will be billed for lost frequency discounts if, within a twelve (12) month period (or written contract period) from date of the first insertion, they do not use the amount of advertising space upon which their billing rate was based.

### 2. COMMISSIONS AND CASH DISCOUNTS

**a. Commissions:** 15% of the gross billing allowed to recognize advertising agencies on space, color, bleed, and position only, provided account is paid within 30 (thirty) days of invoice date. Advertiser's material must be camera-ready to qualify for agency commission. Accounts payable within 30 (thirty) days. No cash discounts allowed.

**b. Sequential Liability:** Advertiser and Advertising Agency are jointly and severally liable for payment. Publisher will not release the Advertising Agency from liability even if a sequential liability clause is included in the contract, insertion order, purchase order, etc.

### 3. TERMS AND CONDITIONS

**a. Terms of Sale:** Net thirty days from date of the invoice. No cash discounts allowed. The Publisher will not accept any form of payment, which contains any limitations or conditions on payment such as short paid checks noted as representing payment in full of a disputed balance.

**b. Indemnity:** All advertisements are accepted and published entirely on the representation that the Advertising Agency and/or Advertiser are properly authorized to publish the entire contents and subject matter thereof. It is understood that, in consideration of the publication of advertisements, the Advertiser and/or Advertising Agency will indemnify and hold the Publisher harmless from and against any claims or suits for libel, violation of rights of privacy, plagiarism, trademark, patent and copyright infringements (including the text and photographs within the advertisements), and other claims based on the contents or subject matter of such publication. The Publisher reserves the right to reject any and all advertising, which the Publisher feels is not in keeping with the publication's standards, policies and principles. The Publisher reserves the right to add the word "Advertisement" at the top and/or bottom of, or anywhere within any publication page, that in the Publisher's sole judgment, too closely resembles editorial pages of the publication. The Publisher will not be bound by any conditions, printed or otherwise appearing on any order blank, insertion order or contract when they conflict with the terms or conditions of the publication's rate card, or any amendment thereof. The Publisher shall not be subject to any liability whatsoever for any failure to publish or circulate all or any part of the publication issue or issues due to strikes, work stoppages, accidents, fires, acts of God or any circumstance not within control of the Publisher. The Publisher is not responsible for the accuracy of any corrections or changes made to any Advertiser's materials. The Publisher's liability for any error will not exceed the charge for the advertisement in question. The Publisher is not responsible for the accuracy of any corrections or changes made to the Advertiser's copy materials. Advertising rates, terms and conditions set forth in the 2020 rate cards shall govern all transactions and supersede any other

information published in previous rate cards, directories, media guides or rate and data services whether in print or online. Publisher will not honor rates or data derived from these other sources unless it is in conformance with this rate card.

**c. Cancellations:** Cancellations must be submitted in writing, accepted up to 45 days prior to closing date published on the editorial calendar for ROB space and 90 days advance notice for Preferred or Specified positions. Cover positions are non-cancelable. Verbal cancellations will not be accepted.

**d. Lines of Credit:** Advertiser's line of credit may increase or decrease from time to time. Such changes will be made at the sole discretion of the Publisher, and no advanced notification is promised or implied.

**e. Past Due Accounts:** Orders may be held at the Publisher's sole discretion.

**f. Collection-related Issues:** If the Publisher must refer Advertiser's delinquent account to an attorney or collection agency, Advertiser agrees to pay all reasonable attorneys' or collection agency's fees, court costs, and other collection costs in connection with the Publisher's collection efforts.

**g. Jurisdiction:** Advertising Agencies and/or Advertisers agree that any legal action arising between the Publisher and Advertising Agency and/or Advertiser must be brought in the courts of the state of Kansas, Johnson County, and that Advertising Agency and/or Advertiser agrees to submit all claims to the jurisdiction of these courts regardless of any conflict of jurisdiction which may arise.

**h. Notification to Publisher:** If the Advertising Agency and/or Advertiser change their address or there is a change of ownership or control of their company, please notify the publisher of this change within ten working days.

**i. Definitions:** As used in this section, the term "Publisher" shall refer to the Informa Wealth Management Group publications.



# 2020 Magazine Ad Production Specifications, Terms & Conditions

## 4. DIGITAL EDITION VIDEO REQUIREMENTS

**File types accepted:** AVI, F4V, FLV, MOV, MP4, MPG, MPEG, SWF and WMV

**Size requirements:** Videos files should not exceed 25MB in size and Adobe Flash content (SWF) files should not exceed 700KS in size.

**YouTube files:** YouTube URLs can be embedded if the advertiser has already posted a video to their YouTube page.

**Video files due date:** No later than 5 days prior to publication mailing date.

## 5. MECHANICAL REQUIREMENTS

Visit <https://informa.sendmyad.com> for more info and guidelines — look under the FAQ and Ad Sizes tabs. All advertising materials can be uploaded as a PDF. Your PDF should conform to the PDF/X-1a specification—however, this is not always possible. If you have questions regarding acceptable file formats, please contact your production coordinator, Lauren Loya at [lauren.loya@informa.com](mailto:lauren.loya@informa.com) or 913-967-1817

**a. Type or Page Size:** Space is available in the following units. Advertisements exceeding type size in any dimension are considered bleed or oversize except for gutter bleed in spreads, and are subject to a 10% surcharge.

### b. Specs

#### Full Page Specs

Full Page Trim	7.5" wide x 10.5" tall
Full Page Live Area	7" wide x 10" tall
Bleed	Extend bleed 0.125" beyond trim

#### Spread Specs

Trim	15" wide x 10.5" tall
Live Area	14.5" wide x 10" tall
Bleed	Extend Bleed 0.125" beyond trim

## Fractionals Specs

2/3 Page	4.5" x 9.75"
1/2 Page (Horizontal)	7" x 4.625"
1/3 Page (Vertical)	2.3125" x 9.75"
1/4 page (Vertical)	3.375" x 4.625"

\* All live matter not intended to bleed should be kept 0.25" from trim. Spread ads should allow a total of 0.1875" safety in gutter.

Print ad specs and guidelines: [assets.penton.com/sma/PASG\\_2017.pdf](https://assets.penton.com/sma/PASG_2017.pdf)

Contact Ad Production Coordinator for special project specs.

**c. Printing:** Web offset.

**d. Binding:** Perfect

## 6. SUBMISSION SPECIFICATIONS

Please refrain from emailing print ad material directly to the production department. Informa publications now use an ad portal called SendMyAd to collect print ads. Please upload your print ads via <https://informa.sendmyad.com>. It takes one minute to create an account and log in. Then, sending your ad is easy.

The advantages of the ad portal include instant file analysis and troubleshooting suggestions. The ad portal allows you to check the ad, reposition the ad, and revise and re-upload the ad one time. When the ad looks like it is ready to print as intended, click Approve to sign off on the ad. If a revision has not resolved the issue with the ad, or if you would like assistance, contact your print production coordinator, Lauren Loya at [lauren.loya@informa.com](mailto:lauren.loya@informa.com) or 913-967-1817.

**This demo** shows how to upload, reposition and approve an ad. Find more how-to videos, ad sizes, InDesign templates and frequently asked questions under the Get Help tab in the ad portal or contact the production coordinator.

We thank you for submitting your print ad via <https://informa.sendmyad.com>

**a.** Any files received that do not meet our requirements will result in a request for resubmission.

**b.** The Publisher will not alter or edit any ad materials. If you are unable to meet the specifications as outlined above, contact your Ad Coordinator to make special arrangements.

**c.** For more information on rates, see the rates section in the 2020 WealthManagement.com Media Kit.

## Shipping Addresses:

Informa does not anticipate manufacturing problems but we cannot guarantee 100% accurate color reproduction without a SWOP-certified color proof. If you choose to send them please send color proofs by the print material deadline to:

**E-mail:** [lauren.loya@informa.com](mailto:lauren.loya@informa.com)

Phone: 913-967-1817

Informa

Attn: Lauren Loya

9800 Metcalf Ave.

Overland Park, KS 66212

## Online & Newsletter Materials

Qamar Tariq, Client Services Coordinator

**E-mail:** [Qamar.Tariq@informa.com](mailto:Qamar.Tariq@informa.com)

**Phone:** 913-967-1688

## 7. PRINT FREQUENCY AND CLOSING DATES

**a.** *Wealth Management* will publish 12x in 2020.

*Trusts & Estates* will publish 12x in 2020.

**b.** Ad closing date is approximately 30 days prior to publication date. Materials due approximately one week after ad closing date. Refer to 2020 Editorial Calendar for precise ad closing and material due dates.

**c.** Publisher reserves the right to change publication frequency, circulation and editorial calendar content.

## 9. SUBSCRIPTION INFORMATION

### a. Wealth Management Subscription Rates

United States: 1 year—\$59. Canada: 1 year—\$71.

All other: 1 year—\$83.

Subscription contact: 866.505.7173

### b. Trusts & Estates Subscription Rates

United States: 1 year—\$275; 2 year—\$440. Canada: 1 year—\$288;

2 year—\$466. All other: 1 year—\$301; 2 year—\$492.

Subscription contact: 800.229.0543



## Advertising contacts

### **PUBLISHER**

MARIANNE RIVERA • 312-635-9116 • marianne.rivera@informa.com

### **BUSINESS DEVELOPMENT MANAGERS**

MARC ANGEL • 212.204.4201 • marc.angel@informa.com

MATT BUTCHER • 212.204.4240 • matt.butcher@informa.com

BETH RUBINOFF • 563-265-7289 • beth.rubinoff@informa.com

TONY ANDRADE • 212.204.4254 • tony.andrade@informa.com

### **HEAD OF SALES**

Kristina Niemi • 312.599.1037 • kristina.niemi@informa.com