

**FINANCIAL ADVISOR**



**Media Kit 2019**

**PRINT / DIGITAL / EVENTS**

**The One-Stop, Multi-Media  
Financial Marketing Solution**

**[www.fa-mag.com](http://www.fa-mag.com)**



**BPA**  
**WORLDWIDE™**

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# Cross-Platform Marketing Opportunities

*Showcase your brand in one or more of our publications, websites and e-newsletters.*



Reaching independent broker-dealer-affiliated advisors and registered investment advisors (RIAs), *Financial Advisor* offers readers unparalleled ideas and strategies to help them better invest for their clients and manage their practices.

[www.fa-mag.com](http://www.fa-mag.com)



A section within *Financial Advisor* magazine and a dedicated website to exclusively target ultra-high-net-worth wealth and family office advisors. These advisors service the financial, legal, insurance/risk management and lifestyle needs of the ultra-affluent.

[www.pw-mag.com](http://www.pw-mag.com)

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*Financial Advisor* magazine hosts a variety of one- and two-day conferences that focus on topics that are important to you and your clients. These topics include, women in wealth management, retirement planning and alternative investing.

10th Annual  
**INSIDE ALTERNATIVES &  
ASSET ALLOCATION**

6th Annual  
**INVEST IN WOMEN**

11th Annual  
**INSIDE RETIREMENT**

[www.conferences.fa-mag.com](http://www.conferences.fa-mag.com)

# Print

## FA Delivers To A Clearly Defined And Targeted Audience of 607,000

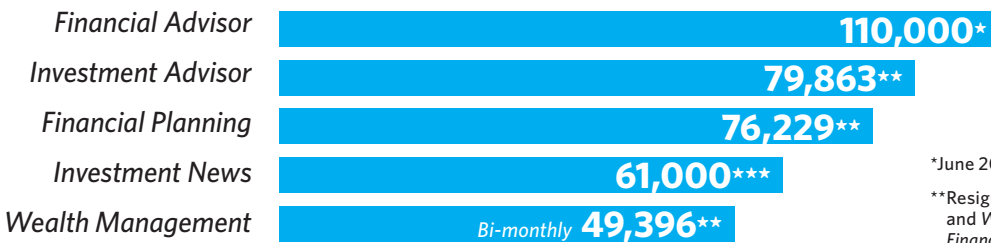


Print: **110,000**  
 Social Media: **117,000**  
 FA News: **200,000**  
 Website (Avg. Unique Visitors): **180,000**

■ Independent Financial Planners/Advisors/RIAs	<b>87.3%</b>
■ Full Service Securities Firm	<b>6.1%</b>
■ Insurance/Accounting/Bank Advisors	<b>6.1%</b>
■ Other Types of Professionals Allied to the Field	<b>.5%</b>

\*June 2019 BPA Brand Report, Total Qualified=110,000

## Competitive Landscape—Print Edition



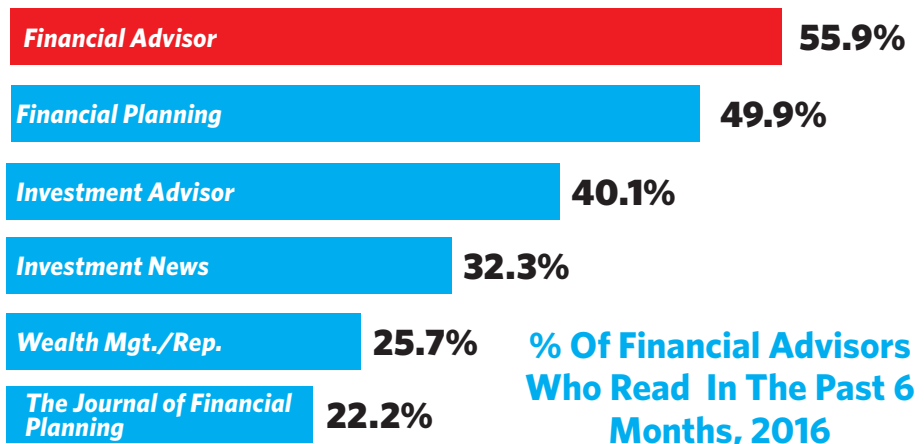
\*June 2019 BPA Brand Report

\*\*Resigned from BPA 2017; *Investment Advisor* and *WealthManagement*, November 2018 Postal Statement. *Financial Planning*, November 2017 Postal Statement.

\*\*\*ABC 2017

## FA Is Ranked The Most Widely Read Trade Publication For The Fourth Consecutive Year

In a recent study, *Financial Advisor* magazine was measured against 30 other print publications. It's leading among its competitors and comes in second in the overall ranking under *The Wall Street Journal*. The Financial Advisor Media Outlook and Usage Study, conducted by Erdos & Morgan, provides unique insights into the thought process and preferences of financial advisors in the professional investment community.



Source: 2016 Erdos & Morgan, Financial Advisor Media and Usage Study (FAMOUS)

## FA Readers Regularly Respond To Advertising And Editorial Content

Actions taken during the past year as a result of advertisements and/or articles in Financial Advisor.

**89%** have referred or discussed an article with someone in a company by passing along a tear sheet, a photocopy or an actual issue.\*

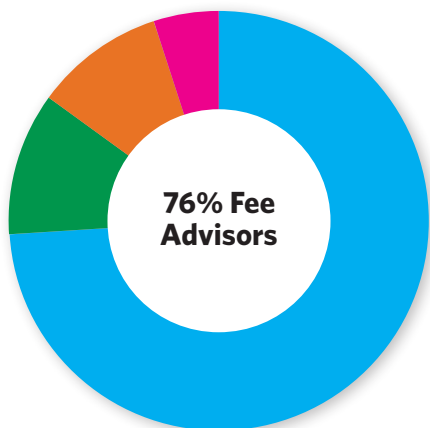
**76%** bought products or services advertised, recommended/specified products to a client or colleague or requested additional information from a company, sales representative or distributor.\*\*

**45%** visited an advertiser's website.\*\*

\*Source: Signet Research 2018 Subscriber Study

\*\*Source: Signet Research Ad Awareness Study, June 2017

## Compensation Structure



■ Fee Advisors	<b>76%</b>
Fee-Based	48%
Fee-Only	28%
■ Commission	<b>11%</b>
■ Salary	<b>8%</b>
■ Other	<b>5%</b>

Source: Signet Research 2018 Subscriber Study

## Products FA Readers Personally Recommended To Clients

Over Past 12 Months

IRAs	<b>82%</b>
Mutual Funds	<b>78%</b>
Roth IRAs	<b>75%</b>
Bonds/Bond Funds	<b>71%</b>
ETFs	<b>70%</b>
Equities	<b>68%</b>
Life Insurance	<b>60%</b>
529 Plans/College Saving Products	<b>57%</b>
Annuities	<b>55%</b>
Fixed Income Products	<b>48%</b>
Long-Term Care Insurance	<b>46%</b>
REITs	<b>45%</b>
Defined Contribution Plans (401k, 403b, 457 Plans)	<b>41%</b>

## Readers Are Experienced Advisors With Established Practices

Years Experience

**26**

Assets Readers Personally Manage on Behalf of Clients  
**\$364.7 Million**

Assets Readers Personally Invested on Behalf of Clients  
**\$24.7 Million**

Average Number of Clients Readers Personally Manage  
**139**

Source: Signet Research 2018 Subscriber Study

# Mission

*Financial Advisor* provides readers with sophisticated planning and investment strategies to help them better manage the wealth of their affluent clients. Our editorial team goes in-depth to offer investment ideas and planning techniques advisors can use to address their clients' financial goals. *FA* also challenges traditional financial planning wisdom by introducing readers to new approaches.

## Unparalleled Content

Editorial excellence is essential for any media vehicle. Accordingly, *FA* brings together a prominent team of editors and contributing writers to provide the most compelling publication for the top decision-makers in the financial advisory field. At *FA*, we have assembled an all-star list of editorial voices within the financial marketplace.

## Editors

**EVAN SIMONOFF**, Founding Editor-in-Chief and Editorial Director, *Financial Advisor* and *Private Wealth* magazines

Evan Simonoff is editorial director of *Financial Advisor* and *Private Wealth* magazines and is a founding partner of Charter Financial Publishing Network (CFPN). He has spent more than 25 years as an editor and reporter covering the financial services industry. Simonoff is a widely recognized expert on personal finance and investments.

**DOROTHY HINCHCLIFF**, Founding Executive Editor, *Financial Advisor* magazine  
Dorothy Hinchcliff is executive editor of *Financial Advisor* magazine and editor of [www.fa-mag.com](http://www.fa-mag.com). Hinchcliff also is director of *FA*'s Invest In Women conference. She has been a financial journalist for more than 25 years.

## Columnists and Writers

Mitch Anthony / Bill Bachrach / Greg Bresiger / Marla Brill  
Joel Bruckenstein / Ron DeLegge / Karen DeMasters / Ric Edelman  
Harold Evensky / Ray Fazzi / Mark Hurley / Robert Laura  
Tracey Longo / Dan Moisand / Nick Murray / Philip Palaveev  
Russ Alan Prince / Eric Rasmussen / Eric L. Reiner / Chris Robbins  
Jeff Schlegel / Catherine Seeber / Ed Slott



# 2019 Editorial Calendar

■ Special Section Content Marketing Opportunity 
 ■ Annual Rankings 
 ■ Conferences Exclusively Produced By FA 
 ■ Private Wealth Section 
 ■ ETF Advisor Section

MONTH	EDITORIAL FEATURES	BONUS CONFERENCE DISTRIBUTION	CONTENT MARKETING	CONTENT MARKETING DUE	IO DUE	MATERIALS DUE	MAIL DATE
Jan	<ul style="list-style-type: none"> <li>U.S. Equity Outlook</li> <li>Annuities</li> <li>ETFs</li> <li><b>Private Wealth Section On The Ultra-High-Net-Worth</b></li> </ul>	<ul style="list-style-type: none"> <li>FSI OneVoice</li> <li>Heckerling Institute on Estate Planning</li> </ul>			Nov 30	Dec 3	Dec 28
Feb	<ul style="list-style-type: none"> <li>U.S. Fixed-Income Outlook</li> <li>Last-Minute Tax Strategies</li> <li>Retirement Investing</li> </ul>	<ul style="list-style-type: none"> <li>TD Ameritrade National LINC</li> <li>Investments &amp; Wealth Institute Investment Advisor Forum</li> <li>Inside ETFs</li> </ul>			Dec 28	Jan 7	Jan 30
Mar	<ul style="list-style-type: none"> <li><b>Women in Planning Special Section</b></li> <li>International Investing Outlook</li> <li>College Planning</li> <li>REITs</li> </ul>		<ul style="list-style-type: none"> <li><b>Women in Planning</b></li> </ul>	Jan 23	Jan 30	Feb 5	Feb 28
							<b>PRINT ADVERTISING AWARENESS STUDY</b>
							<b>WEBSITE ADVERTISING AWARENESS STUDY</b>
Apr	<ul style="list-style-type: none"> <li><b>5th Annual Invest in Women Conference Section</b></li> <li><b>10th Annual Inside Retirement Conference Section</b></li> <li><b>Broker-Dealer Outlook/Annual Broker-Dealer Ranking &amp; Profiles</b></li> <li><b>Private Wealth Section On The Ultra-High-Net-Worth</b></li> <li>Impact/Sustainable Investing</li> <li>ETFs</li> </ul>	<ul style="list-style-type: none"> <li><b>5th Annual Invest in Women</b></li> </ul>		Feb 13	Feb 28	Mar 6	Mar 29
May	<ul style="list-style-type: none"> <li>Young Advisors To Watch</li> <li>Financial Technology For Advisors</li> <li>Retirement Investing</li> <li>LTC Insurance</li> <li><b>ETF Advisor Quarterly Section On ETFs</b></li> </ul>	<ul style="list-style-type: none"> <li><b>10th Annual Inside Retirement</b></li> <li>Morningstar Investment Conference</li> <li>NAPFA Spring</li> <li>Investments &amp; Wealth Institute ACE</li> </ul>			Mar 29	Apr 4	Apr 30
Jun	<ul style="list-style-type: none"> <li>Closed-End Fund Investing</li> <li>Annuities</li> <li>Emerging Markets</li> </ul>	<ul style="list-style-type: none"> <li>Pershing INSITE</li> </ul>			Apr 30	May 7	May 31
Jul	<ul style="list-style-type: none"> <li><b>Annual Top RIA Ranking</b></li> <li><b>Private Wealth Section On The Ultra-High-Net-Worth</b></li> <li>ETFs</li> </ul>				May 30	Jun 6	Jun 28
							<b>PRINT ADVERTISING AWARENESS STUDY</b>
Aug	<ul style="list-style-type: none"> <li><b>Broker-Dealer Recruiting Special Section</b></li> <li>Retirement Investing</li> <li>Cryptocurrency</li> <li>Donor-Advised Funds</li> <li><b>ETF Advisor Quarterly Section On ETFs</b></li> </ul>		<ul style="list-style-type: none"> <li><b>Broker-Dealer Recruiting</b></li> </ul>	Jun 21	Jun 28	Jul 3	Jul 29
Sep	<ul style="list-style-type: none"> <li>College Planning</li> <li>International Investing</li> <li>Annuities</li> </ul>				Jul 30	Aug 6	Aug 28
Oct	<ul style="list-style-type: none"> <li>Investment Model Portfolios</li> <li>ETFs</li> <li>Year-End Tax Strategies</li> <li><b>Private Wealth Section On The Ultra-High-Net-Worth</b></li> </ul>	<ul style="list-style-type: none"> <li>NAPFA Fall National</li> </ul>			Aug 30	Sep 5	Sep 30
							<b>WEBSITE ADVERTISING AWARENESS STUDY</b>
Nov	<ul style="list-style-type: none"> <li><b>Fixed-Income Special Section</b></li> <li>Retirement Investing (401k Planning)</li> <li>Financial Technology For Advisors</li> <li><b>ETF Advisor Quarterly Section On ETFs</b></li> </ul>	<ul style="list-style-type: none"> <li><b>10th Annual Inside Alternative Investments</b></li> <li>Schwab IMPACT</li> </ul>	<ul style="list-style-type: none"> <li><b>Fixed-Income</b></li> </ul>	Sep 23	Sep 30	Oct 7	Oct 30
Dec	<ul style="list-style-type: none"> <li>Annuities</li> <li>Charitable Giving</li> <li>Emerging Markets</li> </ul>			Oct 23	Oct 30	Nov 5	Nov 29
							<b>PRINT ADVERTISING AWARENESS STUDY</b>

**IN EVERY ISSUE:** Retirement Planning, ETFs, Mutual Funds, Technology, Wealth Management, Client Relations, Investing, Estate Planning, Practice Management.

## FA 2019 Display Rates

FOUR-COLOR	1X	3X	6X	12X
Full Page	\$16,620	\$16,090	\$15,320	\$14,570
2/3 Page	14,680	14,275	13,630	12,870
1/2 Page	12,635	12,225	11,465	10,585
1/3 Page	10,710	10,470	9,830	9,177
Spread	30,955	30,075	28,615	27,025

### COVER RATES

Cover 2 (Inside Front)		\$23,875	\$22,585	\$21,300
Cover 3 (Inside Back)		22,585	21,300	20,365
Cover 4 (Back Cover)		25,160	23,875	22,585

**For pricing of high impact and unique units such as false cover tips, gatefolds and sponsored content, please contact your sales rep.**

*Bleed – add 10%. Preferred or special positions – add 10%.*

*A short rate will be applied to any advertiser who does not fulfill contracted frequency. **All rates listed above are gross.***

### AD SIZES

#### Covers and Full Pages

Trim	8½" x 10⅞"
Bleed	8⅝" x 11⅛"
Live Area	7⅝" x 10⅜"

#### Spreads

Trim	16¼" x 10⅞"
Bleed	16½" x 11⅛"
Live Area	15¾" x 10⅜"

#### Fractional Ad Sizes

2/3 Horz.	7" x 6"
2/3 Vert.	4½" x 9¾"
1/2 Horz.	7" x 4½"
1/2 Vert.	4½" x 7"
1/3 Sq.	4½" x 4½"
1/3 Horz.	7" x 3"
1/3 Vert.	2¼" x 9¾"

### DIGITAL FILE SPECIFICATIONS FOR PRINT

#### Media

- E-mail (maximum file size 5 MB), CD/DVD Rom or FTP
- Please label CDs/e-mail with name of advertiser and issue date.

#### Preferred format: PDF

- Files should be 100% complete with all high-resolution images (300dpi) and fonts embedded.
- Color files must be CMYK format. Spot colors will be converted to process unless indicated otherwise.
- Files must contain Type 1 postscript fonts. TrueType and Multiple Master fonts are not supported.
- Page files should be built to the trim size with the bleed area extending 1/8" beyond the trim. Keep all text and images within the live area (1/4" in from trim).
- Images should be TIFF or EPS format in CMYK or Grayscale. Do not embed ICC profile with images. Total ink density should not exceed 280%.
- Offset printer's marks at 12 points from trim so they do not appear within the print or bleed area.

#### Proofs

All color ads must include a SWOP standard color proof. All b/w ads must include a composite laser.

#### FTP Instructions

Go to [www.fa-mag.com](http://www.fa-mag.com) and click on the "FTP Site" at the bottom of the page.

User name: ads\_fa; Password: fauploads. Please e-mail Aimee Melli ([aimee@fa-mag.com](mailto:aimee@fa-mag.com)) with the file name and issue date once the ad has been uploaded to the site.

**FOR SPECS VISIT:** [www.fa-mag.com/fa-print-ad-specs](http://www.fa-mag.com/fa-print-ad-specs)

**RATE QUESTIONS?** Call Dawn Zarcaro at 732-450-8866, ext. 22 or e-mail: [dawn@fa-mag.com](mailto:dawn@fa-mag.com)

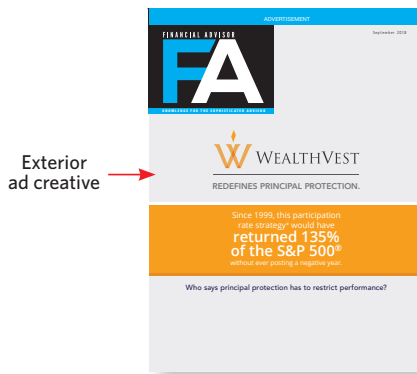
**AD MATERIAL QUESTIONS?** Call Aimee Melli at 732-450-8866, ext. 15 or e-mail: [aimee@fa-mag.com](mailto:aimee@fa-mag.com)

**SEND AD MATERIALS TO:** Financial Advisor, Production Department, 499 Broad Street, Suite 120, Shrewsbury, NJ 07702





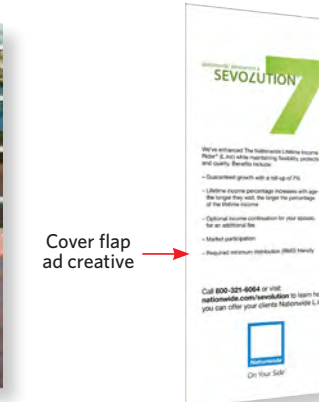
## FALSE COVER/COVER TIP



## COVER GATEFOLD (with page 1)



## FRENCH GATE COVER



## FRENCHDOOR COVER



## BELLYBAND



# Custom Publishing



## Sponsored Content/Advertorials/Native

Whether you have contributed copy available or need support putting your message together, *FA* can assist in helping you deliver your message effectively to our readers.

## Roundtable Interview/Q&A

*FA* will work with you to create an edited Roundtable Q&A with key members of your organization. This is a chance to connect with advisors in your own words, reinforce your messaging and make sure your voice is heard. Clients have the opportunity to edit the Q&A, and will have approval of the final piece before publication.

## Content Marketing

*FA*'s content marketing opportunities allow you to showcase your offerings to advisors through thought leader commentaries.

- MARCH**  
Women In Planning
- AUGUST**  
Broker-Dealer Recruiting
- NOVEMBER**  
Fixed Income



- EACH FEATURE INCLUDES:**
- A 300-word manager commentary & portrait
  - A 100-word company description & logo
  - Print & digital components

## Annual Integrated Sponsorship Opportunities

**APRIL**  
Broker-Dealer Ranking and Profiles  
Broker-Dealers can complement their annual ranking in the *Financial Advisor* Broker-Dealer Survey by showcasing their firm in a corporate advertorial profile.

**APRIL**  
Broker-Dealer Survey  
This 12-month sponsorship opportunity includes print and digital components and is available with a 50% SOV.



**JULY**  
RIA Ranking  
This 12-month sponsorship includes print and digital components and is available with a 25% SOV.



## Native Content and Sponsored Content Opportunities

A member of our editorial team will create a digital article highlighting the topic of your choice. Multi-platform placements include:

- A** Link on home page
- B** Your article will be featured in three-newsletter editions

The screenshot shows the FA website home page. At the top, there is a banner for Natixis with the text "SEEK GREATER DOWNSIDE PROTECTION WITH COMPETITIVE RETURNS". Below this, the date is "October 18, 2018". The main content area features a large article titled "DON'T LET RISING RATES GET YOU DOWN" with a sub-headline "See how we can help you craft an all-weather bond portfolio." and a "DOWNLOAD THE FIXED INCOME FRAMEWORK" button. To the right, there is a sidebar with "TOP NEWS" and "SPONSOR INSIGHTS: 5 keys to a successful transition" (marked with a green 'A').

The screenshot shows the FA Technology newsletter edition. The date is "October 2, 2018". The main article is "Five Tools To Upgrade Your Social Media" by Crystal Washington. Below it is "John Hancock Goes Interactive. Should You Be Worried?". A "SEC Spotlights Inadequate Response To Cyber Intrusion" article is also featured. On the right, there is a Wealthscape advertisement with the text "Explore Wealthescape Get the platform to transform your business." and a list of features: "Collaboration and planning tools", "Digital advice solutions", and "Advisory solutions and more". At the bottom, there is a "Sponsor Insights: 5 Keys to a Successful Transition" article (marked with a green 'B') and a Fidelity logo.

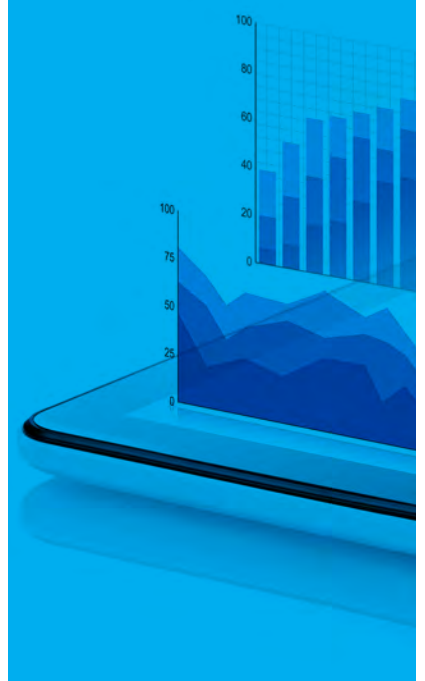
The screenshot shows the FA website home page. At the top, there is a banner with the text "The atom didn't need to be created. It just needed to be discovered." and a "DISCOVER" button. Below this, the date is "October 8, 2018". The main content area features a large article titled "Sponsor Insights: 5 keys to a successful transition" (marked with a green 'A'). To the right, there is a sidebar with "TOP NEWS" and "SPONSOR INSIGHTS: 5 keys to a successful transition" (marked with a green 'B').

The screenshot shows the FA News newsletter edition. The date is "October 9, 2018". The main article is "Nation's Richest Self-Made Women Earned It The Hard Way". Below it is "A Hedge Against Risk That Investors May Be Ignoring" and "Advisors May Have Millennials All Wrong". On the right, there is a list of industry sectors: "Bio data", "IT/ITech", "Mobile Tech", "Biotech", "Pharma", "Automotive", "Healthcare", "Manufacturing", "Telecom", "Hospitality", "Medical Devices", and "Semiconductors". At the bottom, there is a "Sponsor Insights: 5 Keys to a Successful Transition" article (marked with a green 'B') and an Eaton Vance logo.

# 2019 Advertising Awareness Studies

## PRINT & ONLINE

Financial Advisor will partner with Signet Research Inc. and conduct advertising awareness studies in the March, July and December issues of FA, and will study www.fa-mag.com during the months of March and October.



## Run of Site Units

All rates provided are net.

<b>A</b>	
<b>Size</b>	728x90
<b>CPM</b>	\$150

<b>B</b>	
<b>Size</b>	300x600
<b>CPM</b>	\$130

<b>C</b>	
<b>Size</b>	160x600
<b>CPM</b>	\$135

<b>D</b>	
<b>Size</b>	160x600
<b>CPM</b>	\$95

<b>E</b>	
<b>Size</b>	160x600
<b>CPM</b>	\$75

<b>F</b>	
<b>Size</b>	120x120
<b>CPM</b>	\$50

FOR SPECS VISIT:

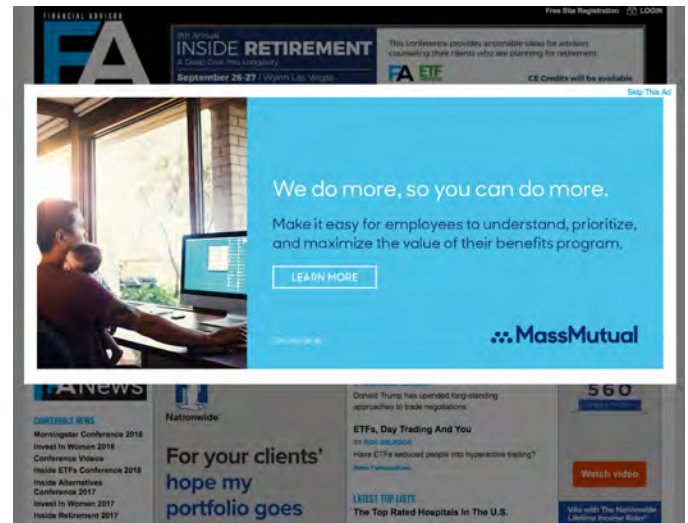
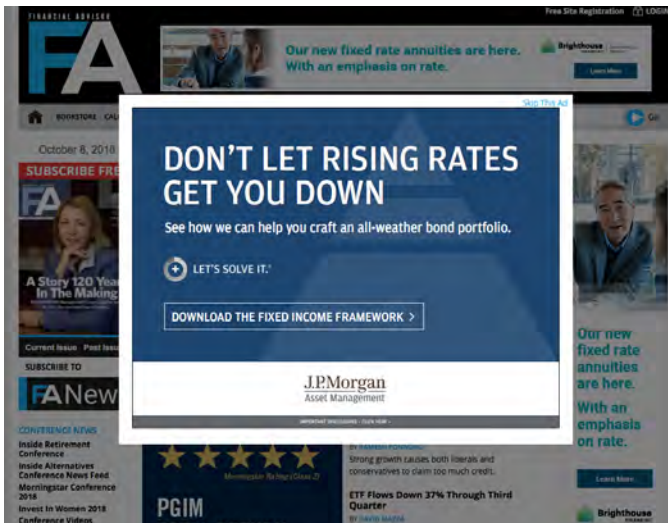
www.fa-mag.com/online-specs

The screenshot shows the FA magazine website interface. At the top, there's a navigation bar with the FA logo, 'ADVISOR OPPORTUNITIES', and 'RAYMOND JAMES'. Below this is a 'TOP NEWS' section with several article teasers. A large central advertisement for Vanguard's VFMF product is visible. To the right, there are sections for 'INVESTMENT PERSPECTIVES' and 'FA BLOGS'. A vertical banner on the right side of the page features a Prudential logo and the text 'PROTECTION OR GROWTH OR OPPORTUNITY? GIVE YOUR CLIENTS BOTH.' At the bottom, there's a 'Spotlight On Weathering the Storm' advertisement for Aberdeen Standard Investments.

## High-Impact Digital Units

All rates provided are net.

<b>Size</b>	640x480	<b>Size</b>	970x420
<b>CPM</b>	\$300	<b>CPM</b>	\$300



FOR SPECS VISIT: [www.fa-mag.com/online-specs](http://www.fa-mag.com/online-specs)

# Other Unique Opportunities

### Spotlight On

This is a hub that lives within the FA-mag website built exclusively for the client. This subsite allows you to feature literature, market outlooks, whitepapers, videos, etc. All featured content will click through to the client's URL to read/experience in its entirety. Traffic drivers/promotional placements will be determined by the type of content featured within the hub.

### Website Homepage Takeover

This opportunity allows you to achieve 100% SOV of the entire page in the form of seven banners that will surround all of the content to capture the viewers attention to your messaging.

### Mobile Takeover

An opportunity to achieve 100% SOV of the banner positions displayed on mobile devices. This includes four banner placements as well as the mobile interstitial unit.

### Conference Content Sponsorships

An opportunity to sponsor the content that we stream onto FA-mag.com from major industry conferences such as Schwab Impact, Morningstar, TD Ameritrade and others. We also offer sponsorships of all FA produced conferences such as Inside Retirement, Inside Alternatives, Invest in Women, etc.

### Exclusive Sponsorship Of Our Annual Young Advisors To Watch List

Our editors compile this list every year and it is a high interest read by our advisor community.

### Video Distribution

We will include your video in various newsletters and dedicated emails, as well as within our own library of videos to gain as much attention to your content as possible.

# FA News

Financial Advisor's electronic newsletter is sent to our list of digital subscribers five times a week. FA News is the source of breaking news and events that directly impact financial advisors and the companies that provide products and services to the advisor marketplace.

<b>Size</b>	300x600
<b>Rates</b>	<b>\$10,000 weekly sponsorship (Mon-Fri)</b> <b>\$2,500 daily sponsorship</b>

## Breaking News Editions

<b>Size</b>	300x600
<b>Rate</b>	<b>\$3,500/edition</b>

## Top Stories of the Week

Sent every Friday.

<b>Size</b>	300x600
<b>Rates</b>	<b>\$10,000 monthly sponsorship</b> <b>\$3,000 weekly sponsorship</b>

**All newsletter sponsorships are 100% SOV.**

**All rates provided are net.**

**FOR SPECS VISIT: [www.fa-mag.com/online-specs](http://www.fa-mag.com/online-specs)**

## Topic-Specific Editions

- |                       |                         |
|-----------------------|-------------------------|
| Alternatives          | International           |
| Broker-Dealer         | Investment Perspectives |
| Benefits              | Mutual Funds            |
| College Planning      | Retirement              |
| Compliance            | Retirement Income       |
| ETFs                  | Retirement Planning     |
| FA Opinion            | RIA News                |
| Fixed Income          | Technology              |
| Health Care           | Variable Annuities      |
| Insurance & Annuities | Women In Planning       |

**Contact your sales representative for consideration of a topic not listed above.**



**Size**  
300x600  
**Rate**    **\$5,000/edition**

**All rates provided are net.**

**FOR SPECS VISIT:** [www.fa-mag.com/online-specs-e-newsletters](http://www.fa-mag.com/online-specs-e-newsletters)

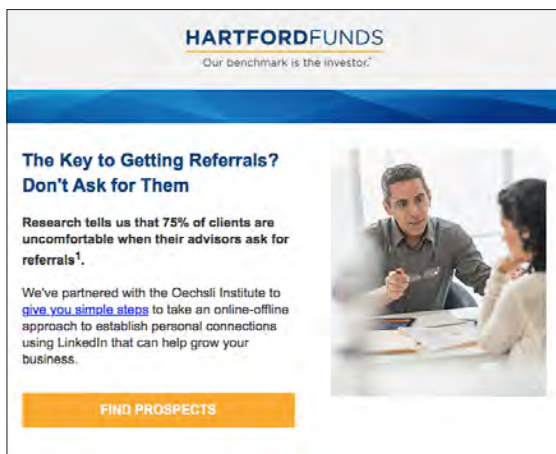
## E-Directs

Send your customized marketing message to our list of e-mail subscribers. Html and text versions are permitted.

### Additional Assistance and Options:

- FA can assist you with selecting or creating the most effective subject lines to target our advisor community.
- A/B split subject lines are encouraged. Send your e-mail in the same day to an evenly split list with two different subject lines to test the strength of your subject line choices.

**Rates**    **\$10,000 Monday through Friday**  
**\$5,000 Saturday or Sunday**



## FA Whitepaper Distribution

Financial Advisor will feature branded whitepapers from industry sponsors and thought leaders, available to subscribers through a monthly digital whitepaper alert blast and posted within the whitepaper section of FA-Mag.com for one month.

For each month's posting, you will be entitled to one whitepaper alert listing and a one-month listing in the whitepaper section of FA-Mag.com. We can only accept a PDF file of the research paper for our distribution offer. Please refer to our lead generation model if you would like to include a URL with submission form.

### Sponsorship Rates

1x	<b>\$1,500/month</b>
3x	<b>\$1,400/month</b>
6x	<b>\$1,200/month</b>
12x	<b>\$1,000/month</b>

The above rates reflect per single listing. For multiple listings by the same firm in the same month, a frequency discount would apply.

## Lead Generation Program

After review of your campaign message, a customized program will be created and executed by our staff. At the close of each month, a series of activity reports will be provided to you as well as the leads that were collected through these efforts.

### Elements that may be included in your customized program:

- Banners on FA-mag.com
- Banners in various topics of our e-newsletters
- Dedicated e-mails
- Whitepaper alert

All placements will be scheduled at our discretion

**Rate: \$150/lead**

**All rates provided are net.**

**FOR SPECS VISIT:**

www.fa-mag.com/online-specs

The screenshot displays the 'FA Whitepaper Alert' section of the Financial Advisor Magazine website. It features a grid of whitepaper listings, each with a title, a brief description, and a 'Read More' link. The listings include:

- Bridging the Gap: Five Ways to Connect With Your Next Generation of Clients** (by TTT)
- Elevating the Client Experience** (by everplans professional)
- How to Manage the Impending Wealth Transfer** (by Black Diamond)
- The Rise of Fixed Income ETFs** (by FlexShares)
- The Nine Elements of Advisor Referralability** (by SEI)
- The future of planning is here and it's a client-centric world.** (by SEI)

At the bottom of the page, there is contact information for the Associate Publisher-Digital (Sandra Croce) and Digital Advertising Director (Justine DeGaetano), along with social media icons and a copyright notice for 2018 Charter Financial Publishing Network.



# Webcast Events

A webcast offers our clients the chance to be recognized as industry leaders, educators and information providers. With every event we create a robust promotional campaign, provide our technology platform and, if applicable, we will submit your webcast content for consideration by both the CFP Board and Investments & Wealth Institute *formerly IMCA* for CE credit approval. After the event we will provide the full list of registered attendees for your event.\*

**Brief definitions and pricing for each level is listed below. Please contact your representative for a complete list of entitlements.**

**SPONSORSHIP LEVEL.** On occasion, contributors of *Financial Advisor* magazine will fully produce a single webcast or a series of webcasts on a specific topic such as: Women in Wealth, Retirement, Estate Planning, etc. Your firm's branding will be included on all promotional efforts. The sponsor will introduce the moderator and also make closing comments. Some of the contributors from past webcasts include Tom Dorsey, Mark Hurley, Bill Bachrach, Nick Murray and Dr. Katy Votava. If one of our webcast topics align with your campaign objective, it would serve as a perfect vehicle to offer positive branding for your firm.

**Rate: \$10,995**

**MEDIA PARTNERSHIP LEVEL.** Partner with *Financial Advisor* to give your fully produced webcast greater exposure in the advisor community and increase attendance. All of the content at this level is provided completely by the client, *Financial Advisor* will not alter the content in any way. For this level, any panelist participating on the event will be sought solely by the client. If any assistance is needed from the *Financial Advisor* magazine staff for content creation or seeking additional panelists this would be considered a custom level event.

**Rate: \$15,995**

**Please note that if your event will require assistance above and beyond our usual services, an additional fee may apply.**

**CUSTOM LEVEL.** *Financial Advisor* magazine editors will work with the client to create a single webcast or a series of webcasts. Clients will be able to choose the topic and panelists for each event. Our editors will research the content to be included and will also be the contact for panelists on behalf of the client. Our editors have some of the strongest relationships with highly recognized industry experts, which is beneficial to the success of an event with *Financial Advisor* magazine.

**Rate: \$19,995**

**Please note that if your event will require assistance above and beyond our usual services, an additional fee may apply.**

**\*For one-time use only, list rental agreement is required.**

**All rates provided are net.**

## Additional website information

**Delivery Schedule:** Within five business days of flight date. Some rich media formats require seven business days for testing.

**New Creative:** Option to change creative content of any advertising space once per month.

**Creative Submission:** E-mail [digitalops@fa-mag.com](mailto:digitalops@fa-mag.com)

**Technical Questions:** Call Keith Huryk at 732.450.8866, ext. 20 or [keith@fa-mag.com](mailto:keith@fa-mag.com)



# Conferences & Events **2019**

10th Annual

## **INSIDE ALTERNATIVES & ASSET ALLOCATION**

**October 29-30** | Philadelphia 201 Hotel

This one and a half day event will feature 12 asset managers who will cover a myriad of topics and asset classes, and will be produced in conjunction with a series of corresponding webcasts.

**[www.fa-mag.com/alts](http://www.fa-mag.com/alts)**

6th Annual

## **INVEST IN WOMEN**

**April 27-29, 2020** | Loews Hotel Atlanta

Invest in Women is the leading nationwide forum offering a 360-degree approach to exploring, discussing and learning about issues that are meaningful to female financial advisors, industry executives and the clients they serve.

**[www.fa-mag.com/women](http://www.fa-mag.com/women)**

11th Annual

## **INSIDE RETIREMENT**

**Date and Location TBD**

This event is the first and largest retirement conference for advisors. Key industry experts and prominent advisors share their insights and strategies and help advisors assist clients with individual retirement needs. The conference offers a forum to hear and share ideas on the new realities of retirement and allows advisors to discuss the latest strategies and top-level solutions.

**[www.fa-mag.com/retirement](http://www.fa-mag.com/retirement)**

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### **FOR SPEAKING OR SPONSORSHIP OPPORTUNITIES, CONTACT:**

David Smith, Founding Publisher at **732.450.8866**, ext. 26 or **[dsmith@fa-mag.com](mailto:dsmith@fa-mag.com)**.



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