



# BRAND REPORT

FOR THE 6 MONTH PERIOD ENDED JUNE 2022



No attempt has been made to rank the information contained in this report in order of importance, since BPA Worldwide believes this is a judgment which must be made by the user of the report.

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**FINANCIAL ADVISOR** is produced exclusively for independent advisors by one of the most experienced and respected publishing teams in the industry. Reaching independent financial planners/advisors, registered investment advisors (RIAs), and other industry professionals as reported herein. FA offers advisors unparalleled ideas and strategies to help them better invest for their clients and manage their practices.

**MAGAZINE CHANNEL FORMAT – PRINT ISSUES**

**FINANCIAL ADVISOR** is produced in a print format. The editorial for the print copy is the same for all recipients.

**BRAND REPORT PURPOSE**

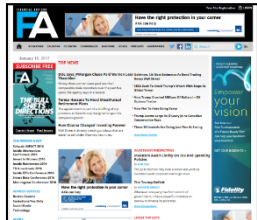
The Brand Report provides a deeper understanding and identification of all audited touch points with customers that have interest in the brand. It is designed to present analysis of all communication channels, including a brand’s unique users within each channel of, but not across, multiple media platforms. This non-integrated report contains data for each separate media channel as indicated in the Executive Summary. No attempt has been made to identify or eliminate duplication that may exist across media channels.

## CHANNELS

**FINANCIAL ADVISOR  
PRINT MAGAZINE**



**FINANCIAL ADVISOR  
WEBSITE**



## EXECUTIVE SUMMARY

Below are the average contacts per occurrence, including frequency per period reported.

	Non-Paid	Paid	Average
<b>FINANCIAL ADVISOR PRINT MAGAZINE</b> (5 issues in the period)	60,000	-	60,000
(See Paragraph 3b for Source)			
<b>FINANCIAL ADVISOR WEBSITE</b> (Monthly Users with 502,554 average Pageviews)	178,978	-	178,978

**MAGAZINE CHANNEL FORMAT: This magazine is produced in print format.**

No attempt has been made to identify or eliminate duplication that may exist across media channels.

**FIELD SERVED**

**FINANCIAL ADVISOR** serves the fields of financial planning, registered investment advisory, securities brokerage, insurance firms, CPA/Planners, banking/investment, and others allied to the field.

**DEFINITION OF RECIPIENT QUALIFICATION**

Qualified recipients include titled and non-titled personnel in the Field Served.

**AVERAGE NON-QUALIFIED CIRCULATION**

Non-Qualified Not Included Elsewhere	Copies
Other Paid Circulation	-
Advertiser and Agency	1,516
Allocated for Trade Shows and Conventions	46
All Other	782
<b>TOTAL</b>	<b>2,344</b>

**1. AVERAGE QUALIFIED CIRCULATION BREAKOUT FOR THE PERIOD**

Qualified Circulation	Total Qualified		Qualified Non-Paid		Qualified Paid	
	Copies	Percent	Copies	Percent	Copies	Percent
Individual	60,000	100.0	60,000	100.0	-	-
Sponsored Individually Addressed	-	-	-	-	-	-
Membership Benefit	-	-	-	-	-	-
Multi-Copy Same Addressee	-	-	-	-	-	-
Single Copy Sales	-	-	-	-	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>60,000</b>	<b>100.0</b>	<b>60,000</b>	<b>100.0</b>	<b>-</b>	<b>-</b>

**2. QUALIFIED CIRCULATION BY ISSUES FOR PERIOD**

2022 Issue	Total Qualified
January/February	60,000
March	60,000
April	60,000
May	60,000
June	60,000

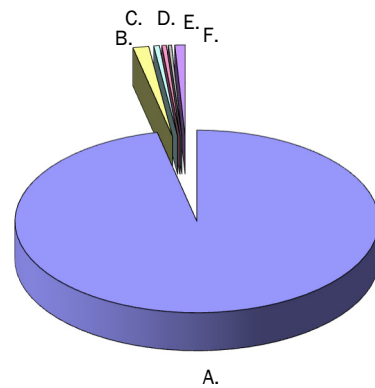
**3a. BUSINESS/OCCUPATION BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF JUNE 2022**  
 This issue is equal to the average of the other 4 issues reported in Paragraph 2.

Business and Industry (Note 1)	Total Qualified	Percent of Total
Independent Financial Planner/Advisor/RIA	57,925	96.5
Full Service Securities Firm	811	1.4
Insurance Firms	317	0.5
CPA/Planner	254	0.4
Banking/Investment	156	0.3
Others Allied to the Field	537	0.9
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>60,000</b>	<b>100.0</b>
<b>PERCENT</b>	<b>100.0</b>	

Note 1: Qualified recipients include titled and non-titled personnel in the Field Served.

**3a. Breakout of Qualified Circulation of Business and Industry**

Business and Industry	Total Qualified	Percent of Total
A Independent Financial Planner/Advisor/RIA	57,925	96.5
B Full Service Securities Firm	811	1.4
C Insurance Firms	317	0.5
D CPA/Planner	254	0.4
E Banking/Investment	156	0.3
F Others Allied to the Field	537	0.9
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>60,000</b>	<b>100.0</b>



**3b. QUALIFICATION SOURCE BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF JUNE 2022**

Qualification Source	Total Qualified	Percent
I. Direct Request:	37,171	62.0
II. Request from recipient's company:	-	-
III. Membership Benefit:	-	-
IV. Communication (other than request):	-	-
V. <b>TOTAL</b> - Sources other than above (listed alphabetically):	22,829	38.0
Association rosters and directories	-	-
*Business directories	22,829	38.0
Manufacturer's, distributor's, and wholesaler's lists	-	-
Other sources	-	-
VI. Single Copy Sales:	-	-
<b>TOTAL QUALIFIED CIRCULATION</b>	<b>60,000</b>	<b>100.0</b>
<b>PERCENT</b>	<b>100.0</b>	

\*See Additional Data

Note: 13,684 copies or 22.8% of Total Qualified circulation is > 24 months.

**AVERAGE ANNUAL AUDITED QUALIFIED CIRCULATION AND CURRENT UNAUDITED CIRCULATION**

6-Month Period Ended:	Audited Data		Audited Data		Circulation Claim	
	July – December 2019	January – June 2020	July – December 2020	January – June 2021	July – December 2021*	January – June 2022*
Total Audit Average Qualified:	129,821	130,609	130,167	80,000	80,000	60,000
Qualified Non-Paid Total:	129,821	130,609	130,167	80,000	80,000	60,000
Print:	100,000	76,667	80,000	80,000	80,000	60,000
Digital:	29,821	53,942	50,167	-	-	-
Qualified Paid Total:	-	-	-	-	-	-
Print:	-	-	-	-	-	-
Digital:	-	-	-	-	-	-
Post Expire Copies in Total Qualified Circulation:	**NC	**NC	**NC	**NC	**NC	**NC
Average Annual Order Price:	**NC	**NC	**NC	**NC	**NC	**NC

\*NOTE: July 2021 – June 2022 data is unaudited. With each successive period, new data will be added until six 6-month periods are displayed.

\*\*NC = None Claimed.

**GEOGRAPHICAL BREAKOUT OF QUALIFIED CIRCULATION FOR ISSUE OF JUNE 2022\***

State	Total Qualified	Percent	State	Total Qualified	Percent
Maine	231		Kentucky	569	
New Hampshire	388		Tennessee	981	
Vermont	130		Alabama	611	
Massachusetts	1,936		Mississippi	189	
Rhode Island	227		EAST SO. CENTRAL	2,350	3.9
Connecticut	1,205		Arkansas	320	
NEW ENGLAND	4,117	6.9	Louisiana	534	
New York	3,647		Oklahoma	373	
New Jersey	2,577		Texas	3,652	
Pennsylvania	2,961		WEST SO. CENTRAL	4,879	8.1
MIDDLE ATLANTIC	9,185	15.3	Montana	185	
Ohio	2,343		Idaho	245	
Indiana	1,108		Wyoming	67	
Illinois	2,854		Colorado	1,503	
Michigan	1,954		New Mexico	171	
Wisconsin	1,323		Arizona	1,254	
EAST NO. CENTRAL	9,582	16.0	Utah	434	
Minnesota	1,641		Nevada	300	
Iowa	682		MOUNTAIN	4,159	7.0
Missouri	1,151		Alaska	71	
North Dakota	124		Washington	1,316	
South Dakota	167		Oregon	720	
Nebraska	414		California	6,355	
Kansas	682		Hawaii	242	
WEST NO. CENTRAL	4,861	8.1	PACIFIC	8,704	14.5
Delaware	243		UNITED STATES	59,973	100.0
Maryland	1,410		U.S. Territories	24	
Washington, DC	192		Canada	-	
Virginia	1,598		Mexico	-	
West Virginia	129		Other International	-	
North Carolina	1,892		APO/FPO	3	
South Carolina	708				
Georgia	1,710				
Florida	4,254				
SOUTH ATLANTIC	12,136	20.2			
			<b>TOTAL QUALIFIED CIRCULATION</b>	<b>60,000</b>	<b>100.0</b>

\*See Additional Data

## WEBSITE CHANNEL

### WWW.FA-MAG.COM

2022	Pageviews	Sessions	Users	Average Session Duration
January	572,422	296,383	205,130	1:27
February	467,312	247,758	172,175	1:30
March	531,022	277,812	185,939	1:35
April	494,892	249,415	172,015	1:32
May	431,936	222,574	152,730	1:38
June	517,745	271,239	185,882	1:29
<b>AVERAGE:</b>	<b>502,554</b>	<b>260,863</b>	<b>178,978</b>	<b>1:31</b>

January – June 2022 data was provided by Google Analytics. All website activity is audited by BPA Worldwide.

### WEBSITE GLOSSARY

**Pageviews:** A Pageview is recorded each time a page implanted with the JavaScript code (tag) is displayed in a browser window. This will occur whether the page is served directly from the web server, from a proxy, or from the browser's cache.

**Sessions:** A single continuous set of activity attributable to a cookie browser resulting in one or more pulled text and/or graphics downloads from a site. A period of 30 minutes of inactivity will terminate the session.

**Users:** An identified and unduplicated Cookie Browser that accesses Internet content or advertising during a measurement period.

**Average Session Duration:** The time visitors remain on a site per session.

## ADDITIONAL DATA

### MAGAZINE:

#### PARAGRAPH 3b:

Business directories include 1 source of circulation for a quantity of 22,829 copies or 38.0%, including Data Discovery Financial Services Directory.

### GEOGRAPHIC DISTRIBUTION:

Geographic data for Website is not reported at the media owner's option.

### PUBLISHER'S AFFIDAVIT

We hereby make oath and say that all data set forth in this statement are true.

Charlie Stroller, CEO

Linda Schmitt, Circulation Director

(At least one of the above signatures must be that of an officer of the publishing company or its authorized representative.)

#### IMPORTANT NOTE:

This unaudited brand report has been checked against the previous audit report. It will be included in the annual audit made by BPA Worldwide.

Date signed

County

State

Received by BPA Worldwide

Type

ID Number

August 3, 2022

Monmouth

New Jersey

August 3, 2022

BJ

F207B0J2

### About BPA Worldwide.

BPA Worldwide is in the business of providing assurance. For 80+ years as a not-for-profit assurance service provider, BPA was originally created by advertisers, advertising agencies and the media industry to audit audience claims used in the buying and selling of advertising. Performing nearly 1,000 annual audits of media channels in 19 countries, BPA is a trusted resource for compliance and assurance services.

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